

POI
PROMOTION OPTIMIZATION INSTITUTE

The Promotion Optimization Institute's
Consumer Goods State of the Industry Research

CPG RETAIL REINVENTED

Where Innovation, Planning, and Execution Deliver Resilience, Growth, and Conviction

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POI State of the Industry 2026 Report

As with our previous surveys, the 2026 Promotion Optimization Institute (POI) Enterprise Planning (EPx), Revenue Management, and In-Store Retail Execution (RetX) Benchmarking Survey focused on the intersection of the people, process, and technologies required to be a suitable collaboration partner in the promotion and distribution of consumer products.

Leading CPG Industry Retailers and Manufacturers prioritize building organizational resiliency by investing in Holistic Enterprise Planning™, omnichannel balance, revenue management, marketing, supply chain, and finding areas of efficiency with people, processes, and systems.

As we begin 2026, the global economy continues to be volatile. Organizations continue to invest in new technology and automated capabilities that enhance visibility, provide strategic insights, improve decision-making, drive revenue, increase return on investment, outpace competition, and reduce costs. CPG leaders have the opportunity to build innovative strategies to ensure efficiency and growth for their organizations. The POI State of the Industry Research can be utilized to provide your organization strong investment conviction around Holistic Enterprise Planning™ Capabilities.

If you are investigating new Holistic Enterprise Planning™ solutions and want to know what's possible across EPx (TPM-What-if Scenarios-ROI), RGM/TPO, and the RetX space, you can review capabilities and vendor offerings in the POI Enterprise Planning and Retail Execution Vendor Panoramas at: https://poinstitute.com/membership



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Promotion Optimization Institute State of the Industry Survey & Report

Rationale Behind the Survey:

POI seeks to serve its members by identifying strategic leadership focal points and streamlining critical leadership success factors on hot issues and emerging trends while incorporating the 2025 benchmarking survey results. We look at the successes and challenges in promoting and distributing consumer products and then analyze them at global events and through written research, share groups, webinars, and advisory services. The focal areas of this survey were selected based on the summation of our beliefs about where the challenges exist today and a desire to socialize the topics and recommendations with CPG industry leadership.

*Note that while most companies in the survey are constant year-over-year, the responders can change from one year to the next, influencing the research data.

Attribution of the POI Survey Results and Report:

We have included a non-PDF version of the report on our POI Member portal to serve our members.
https://poinstitute.com/membership

This non-PDF version of the report will enable your organization to utilize report content efficiently. When using POI State of the Industry report information, it is critical for you and your organization to attribute POI and the POI 2026 State of the Industry report for the research, thought leadership, and industry insights utilized.

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Manufacturer Connect

This report includes industry insights gained from the 2025 State of the Industry Surveys, POI 1:1 manufacturer interactions, and the POI Manufacturer Connect & RGM Share Groups.

The POI Manufacturer Connect has consistently met every 6-8 weeks over the past seven years. This community is essential to navigating the CPG Industry, consumer behavior, omnichannel strategies, global economic changes, and new technologies.

This report and its insights will help you understand how your peers are building strategies to address the complexities of the rapidly changing retail landscape and how they plan to reinvent their organizations around innovation, planning, and execution to deliver resilience, growth, and conviction.

For more information on joining the POI Manufacturer Connect, please contact Joanie Malin, jmalin@p-o-i.org



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CPG Industry Snapshot

Facts, Trends, Inflation, Outlook,
C-Suite Focus, and Headline Insights

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CPG Industry Facts



CPG 10.5% of US Employment

- 1 in 10 jobs in America are in CPG
- $22.3M American Jobs
- 3x the size of NYC



$1.5 Trillion in Salaries, Wages, Benefits

- 30% increase in wages in last 5 years
- For every CPG job there are an additional 7.3 jobs created in US



$2.5 Trillion GDP

- 10% of the National GDP is from the Consumer Packaged Goods Industry
- Larger than Canada's 2023 GDP



Constantly Changing and Evolving

- Ecommerce and Digital
- Supply Chain
- Personalization
- Consumer behavior changes



Largest Manufacturing Employer in US

- $195 Billion of labor income.

See sources on page 198.

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Inflation

As we enter 2026, prices are rising more slowly than in recent years, though inflation remains above long-term norms. Global inflation is expected to hover around 3%, and everyday costs in many developed markets are still elevated. High interest rates continue to strain household budgets, keeping consumers cautious. Recent policy measures, such as lowering tariffs on essential imported goods like consumer products, aim to reduce price pressures and improve affordability. Consequently, shoppers are increasingly focused on value, carefully considering price, quality, and promotions as they navigate the ongoing economic uncertainty.

- December 2025 retail sales were up 3.4% year-on-year, according to the U.S. Census Bureau.
- Spending remains resilient from deleveraged consumers, supported growth in 2025, and it also bodes well for 2026. Analysts project a 3-5% rise in global consumer spending for 2026.
- The U.S. GDP growth rate is likely to substantially outperform consensus estimates because of tax cuts, easier financial conditions, and a reduced drag on the economy from tariffs, according to Goldman Sachs.
- Interest rates began to decrease over the last 18 months and are expected to keep falling in 2026, according to the U.S. News & World Report projections.
- In 2025, the economic indicators showed encouraging signs, including consistent job growth, robust consumer spending, positive economic expansion, reduced inflation, and decreasing interest rates. Looking forward to 2026, we anticipate facing similar challenges and opportunities that we experienced in the back-half of 2025.

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See sources on page 198.

Inflation

Global consumer spending is expected to continue to increase in 2026, but shoppers remain cautious. Inflation has slowed compared to recent years, yet prices are still rising faster than they did historically. In many developed markets, everyday costs remain elevated, and higher interest rates continue to strain household budgets. As a result, consumers are more focused on value than ever, carefully weighing price, quality, and promotions before making purchasing decisions.

In response, consumer goods companies are paying closer attention to how they grow their business. Over the past several years, POI has highlighted the importance of managing three key drivers of performance: pricing, sales volume, and product mix. Simply put, companies must decide what to charge, how much they sell, and which products they prioritize. These decisions are closely connected, and small changes in one area can significantly impact the others. In recent years, many CPG organizations have increasingly relied on reviewing their product portfolios and package sizes to improve efficiency while still meeting consumer needs.

In 2026, companies are also paying closer attention to external factors that can affect costs and pricing, including trade policies and tariffs. Because these changes can influence product costs and consumer demand, many organizations are evaluating their supply chains, reviewing their product portfolios, and improving planning processes. The goal is to remain flexible, protect margins, and continue delivering value, even as economic conditions remain uncertain.

For Consumer Goods companies, anticipating 2026 spending patterns by brand portfolio and accelerating automation across enterprise planning, revenue management, marketing, and retail execution will be critical to delivering growth strategies. At the same time, understanding tariff exposure across the supply chain and building effective contingency plans will be essential to minimizing risk and protecting margins.

The POI State of the Industry report provides a clear view into how peer CPG companies are responding to economic pressures while driving efficiency and sustainable growth into 2026.

UNCERTAINTY

INFLATIONARY PRESSURES

SHIFTING CONSUMER PRIORITIES

SUPPLY CHAIN VOLATILITY

EVOLVING RETAIL LANDSCAPES

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2026 CPG Industry Outlook:

In 2026, CPG manufacturers will continue navigating economic uncertainty while fundamentally reinventing and redesigning how they operate, make decisions, and grow. Success will hinge not on isolated efficiency efforts, but on integrated, consumer-centric transformation.

Key Outlook Themes:

1. Manufacturers are shifting from reactive cost containment to intentional value creation
2. Organizational models are being redesigned to improve decision velocity and scale
3. Digital transformation is accelerating, and we see a widening of the performance gap
4. Growth will be driven by connected, Holistic Enterprise Planning™ and execution, not siloed optimization

POI Insight:
Operational resilience and growth are no longer sequential. They must be achieved in parallel.

The POI State of the Industry Survey reveals that manufacturers are committed to investing in technologies that automate and transform their organizations, driving cost savings, enhancing cross-functional processes and visibility, and enabling efficient growth.

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Omnichannel Holistic Enterprise Planning™ & Execution is the CPG Operating Model for Growth

Connecting Consumer, Data, Planning, and Execution Across the Enterprise

1. **Consumer & Shopper at the Center**

   Omnichannel strategies should focus on the changing consumer and shopper journeys, rather than internal business or channel silos.

2. **Connected Data & Insights Foundation**

   Having unified and trusted data across physical retail, digital, and retail media channels are now essential for achieving speed, accuracy, scale, and confidence in decision-making.

3. **Integrated Closed-loop Ecosystem**

   TPMx, RGM, category management, omnichannel activation, retail execution, and supply chain planning must operate as connected, holistic enterprise planning™ and execution capabilities, not standalone functions.

4. **Organizational Readiness & Decision Intelligence**

   Leading organizations are aligning people, process, and technology — leveraging advanced analytics and AI to scale decisions and improve efficiency and growth objectives.



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2026 • The C-Suite Shift

Scaling Intelligence, Speed, & Profitability

> "The focus is shifting from managing disruption to scaling intelligence, speed, and profitable growth."
>
> **Pam Brown, CCO, POI**



2025: Managing Through Uncertainty

- Cost containment & resiliency
- Promoting a data-driven culture
- Fostering innovation
- Digital supply chain visibility
- Portfolio defense & sustainability
- Enterprise planning alignment
- Employee well-being & culture



2026: Scaling Intelligent Growth

- Value Creation & Margin Architecture
- Data-driven insights as a competitive advantage for growth (foundation for decision velocity)
- AI-enabled workflows, decisioning & governance
- Intelligence-led innovation
- Holistic Enterprise Planning™ & Optimization of Retailer engagement & commercial execution
- Operating model transformation & organizational clarity and readiness

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2026 Essential Priorities - *What It Takes to Scale Intelligent Growth*

Evolving from Cost Management to Value Creation & Margin Architecture

Assess margin architecture across different channels, packaging, consumers, and occasions. Evaluate Total Investment—including trade, marketing, retail media, innovation, and pricing—then develop an investment strategy to achieve the goals. Align company strategies and incentives to prioritize profitability over volume. Requires value-based transformation metrics beyond cost savings and considers value chain growth drivers.

Holistic Enterprise Planning™, Enhanced Forecasting, & RGM Capability Advancements

End-to-end planning, maximizing cross-functional insights to deliver strategic objectives and efficiencies to enable Joint Customer Business Planning. Increased focus on Integrated Business Planning to improve coordination between marketing, sales, customer development, finance, demand, and supply teams. Close the loop between strategy, planning, and execution outcomes.

Employee

Safety, personal and mental health, work-life balance, diversity, wage equity, and social goals are critical to creating a future-ready culture. This includes recruitment and retention. Adjust critical resources and talent to support a defined growth plan. AI-augmented workforce models: Supporting teams with decision intelligence rather than adding headcount.

Moving From Disparate Data to Data-Driven Insights With Decision Velocity as a Competitive Advantage for Growth

Reducing time to decision increases decision velocity, enabling manufacturers to respond faster to changing consumer behavior and retailer needs. Cross-functional alignment must be embedded in the workflow. As AI changes the work and workflows, strategic alignments and decision speed will increase.

AI Maturity Stages Evolving to an AI-enabled Ecosystem

Holistic Enterprise Planning™ leverages AI to enhance decision-making by dynamically modeling demand across scenarios driven by volatility, economic conditions, margin pressures, changing consumer behavior, and demand shifts. Manufacturers should integrate AI into their work processes, establish trust in the models, ensure the models are explainable, and implement governance to scale responsibly. This is essential as Holistic Enterprise Planning™ represents key cornerstones of an organization's digital transformation.

Retailer Engagement, Optimization, and Collaboration

Through Joint Customer Business Planning (JCBP), manufacturers must partner around data access, supply chain efficiencies, and retail media investment. By optimizing trade, marketing, and supply chain, manufacturers can uncover efficiencies that can be reinvested to fund retail media strategies and support evolving retailer priorities. Total investment analysis and customer segmentation of top-tier and long-tail retailers is essential to efficiency and growth.

Digital Supply Chain

Focused on resiliency, agility, and sustainability, not only efficiency, so the organization can respond quickly to shifts in consumer demand. Enhancing inventory management and distribution, including real-time inventory visibility. Developing collaborative partnerships to improve the fulfillment experience, especially in the areas of click-and-collect and direct store-to-consumer shipments. Building redundancy across the value chain is also a priority.

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Building Resiliency & Contingency Planning For the Unexpected



As our global CPG industry, supply chains, and world economies are more connected than ever before, organizations need to prepare their data, systems, processes, and utilities to withstand disruptions and threats. Organizations need to build redundancy and resiliency.



World news continues to predict that catastrophic events and disruptions will become less predictable and yet more frequent. We have seen war, resource constraints, climate change, social justice, cyber threats, inflation, terrorism, and geopolitical unrest impact 2025, and we expect organizations will experience similar, if not greater, impacts in the future.



Organizations need to build resiliency, cybersecurity, and contingency plans now to maintain the business and meet consumer needs in the event of an unexpected impact.

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POI 2026 State of the Industry Overview Insights

Enterprise planning & revenue management capabilities are essential to CPG organizations building efficient growth for 2026 & beyond. This report will further elaborate on these insights.

61%
of the respondents agree that their companies face difficulties in executing promotions as planned.

75%
of companies are held back from exceptional retail execution due to sufficient offline capabilities.

50%
state proper data cleansing, harmonizing and staging the data is holding them back from delivering trade promotion optimization and analytics.

55%
of companies are held back from accelerating digital transformation due to internal silos.

29%
will deploy what-if promotion scenario capabilities.

41%
will deploy a post-event analysis tool.

29%
will embark on automated pricing capabilities.

88%
of companies think that growing e-Commerce & digital commerce activation is very important for your organization in the next 12-24 months.

47%
of companies state their headquarter support teams don't have the necessary capabilities to support pricing, trade allocations, and go-to-market strategies.

32%
of companies searching for new Foodservice capabilities do so to handle complex pricing.

53%
of companies are held back from exceptional retail execution due to data and insights not being fully leveraged.

51%
of companies will be embarking on new TPMx systems.

22%
of companies are spending between 11-15% of annual revenue on trade promotions.

To move the needle on RGM efficiency our company needs to improve:

- 67% overall strategy
- 58% of respondents stated pricing
- 53% trade promotions analytics and optimization
- 42% define growth drivers

40%
agree there are challenges moving retail execution user capabilities from transactional to analytical.

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The Essential Need for Holistic Enterprise Planning™

Holistic Enterprise Planning™ is required to navigate economic pressure, shifting consumer demand, forecast efficiency, and retailer complexity.

- **75%** of manufacturers still plan TPMx, RGM, and IBP in disconnected cycles
- **60%** cite cross-functional misalignment as a primary barrier to growth

Siloed planning and optimization result in organizational inefficiency and risk.



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Transforming From Business Unit Silos to an Agile Planning and Execution Enterprise

Organizations must step back and **create a "Holistic Ongoing & Dynamic Enterprise" de-siloed approach** to make faster decisions, meet consumer needs, capture value, and gain efficiency across the business units.

CMO

- Pricing & Lift Coefficients
- Baseline
- Customer Cost-to-Serve
- Spend
- Retail Media

CSO

- Pricing & Lift Coefficients
- Baseline
- Incremental
- Discount Depth & Frequency
- Assortment and mix
- Spend
- Customer Cost-to-Serve
- Retail Media

CFO

- Pricing & Lift Coefficients
- Baseline
- Incremental
- Spend
- Customer Cost-to-Serve

RGM (varies by org)

- Pricing & Lift Coefficients
- Baseline
- Incremental
- Discount Depth & Frequency
- Assortment and mix
- Spend
- Customer Cost-to-Serve

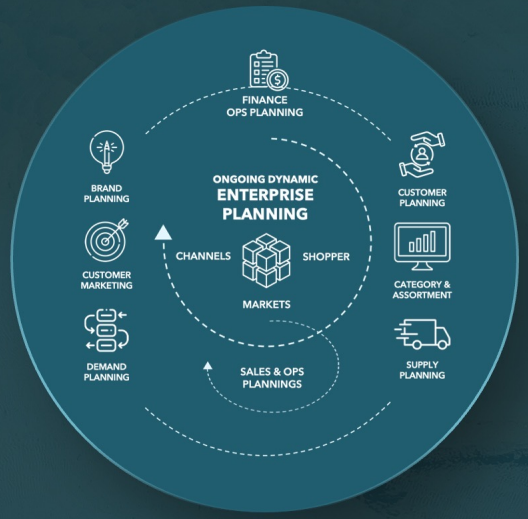
COO

- Pricing & Lift Coefficients
- Baseline
- Incremental

CIO

- Partner to Develop & Deploy Business Technology Requirements

This Holistic Enterprise transformation drives transparency, consistent processes, and accuracy across the organization.



POI recommends establishing a robust enterprise data and analytics foundation powered by intelligent AI. This foundation should integrate comprehensive data management, enterprise-level analytics and reporting, executive dashboards, and the generation of actionable insights. A strong foundation for advanced analytics is crucial, as multiple business units across the enterprise rely on common denominators—such as baselines, lift coefficients, cost-to-serve, etc.—to drive consistent decision-making and unlock value, as illustrated in the accompanying image. This is also important as spending is blurring across marketing and sales due to omnichannel and retail media advancements. Companies need to focus on total investment and cost-to-serve.

The Holistic, Ongoing, Dynamic Enterprise approach facilitates cross-organizational collaboration through consistent foundational data and methodologies. This strategy empowers manufacturers to meet retailers' multifaceted demands while effectively balancing product availability, supply chain dynamics, and profitability. Ultimately, it ensures the right product delivery at the right time and with the right offer to the consumer.

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From Siloed Planning and Optimization to Holistic & Connected Decision Making

Disconnected planning creates decision latency and risk

- **70%** of manufacturers have data but the business units make siloed decisions
- Only **30%** of manufacturers connect promotion decisions to demand and supply planning.

Planning maturity increases when TPMx, RGM, and IBP operate from a shared truth.

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CPG Industry Drivers for Automation, Enterprise Planning, & Optimization

Global Pressure: Economic recovery, social strains, war, raw material costs, tariffs, higher fuel costs, and labor shortages.

- Manufacturers look to **automate capabilities** to provide visibility, insights, cost savings, and the next best action to take based on current industry dynamics.
- **Understanding consumer sentiment** is critical. How brands are represented, promoted, and resonate during troubled times is critical to supporting our consumers through global dilemmas and pressures.
- Manufacturers must **advance Revenue Management practices**, including promotion, pricing, and mix scenarios. Price pack architecture analysis is a key workstream for innovation and brand efficiency. New insights must be presented to the retailers so they have options depending on how the market and consumers are behaving at the moment. Companies with optimization capabilities have demonstrated increased responsiveness and stronger partnerships with retailers. There is a need **to incorporate trade, pricing, and retail media into a unified investment optimization framework.**

Manufacturers are adopting optimization and RGM practices to enhance profitability, organizational efficiency, and effectiveness.

As trade and marketing investments overlap, their individual impact becomes harder to quantify. POI advises solution providers to develop new holistic enterprise capabilities that enhance visibility, measure total investment impact, and analyze consumer behavior drivers.

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> The CPG industry is experiencing a fundamental reinvention of what it takes to innovate, plan, and execute — enhancing profitability, outpacing competition, and navigating global change to deliver resilience, growth, and conviction.

Pam Brown
Chief Commercial Officer,
Promotion Optimization Institute (POI)

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Data Foundation & Management

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Data as the Foundation for Consumer-Centric, Retail-ready Decision Making



Omnichannel Data



Personalization



Advanced Modeling
Behavioral Sensing; AI/ML



Advanced Analytics

Organizations today face the challenge of managing complex data, which presents both a challenge & an opportunity…

High-quality data enables companies to make better strategic and operational decisions and helps them respond quickly to market changes and consumer demand. Data-driven insights allow companies to better understand consumer behavior, leading to more effective marketing and product development strategies. Companies that embrace a strong data foundation will leapfrog those who hesitate. It is important that business functions are engaged in developing a data strategy and ownership of the data; it isn't just an IT exercise.

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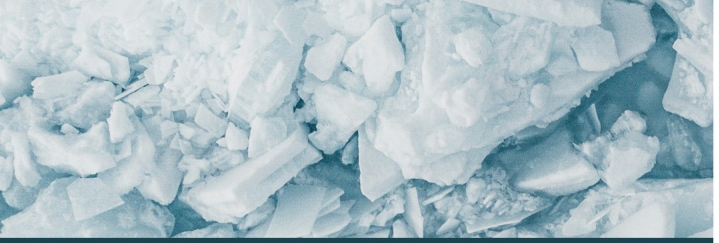


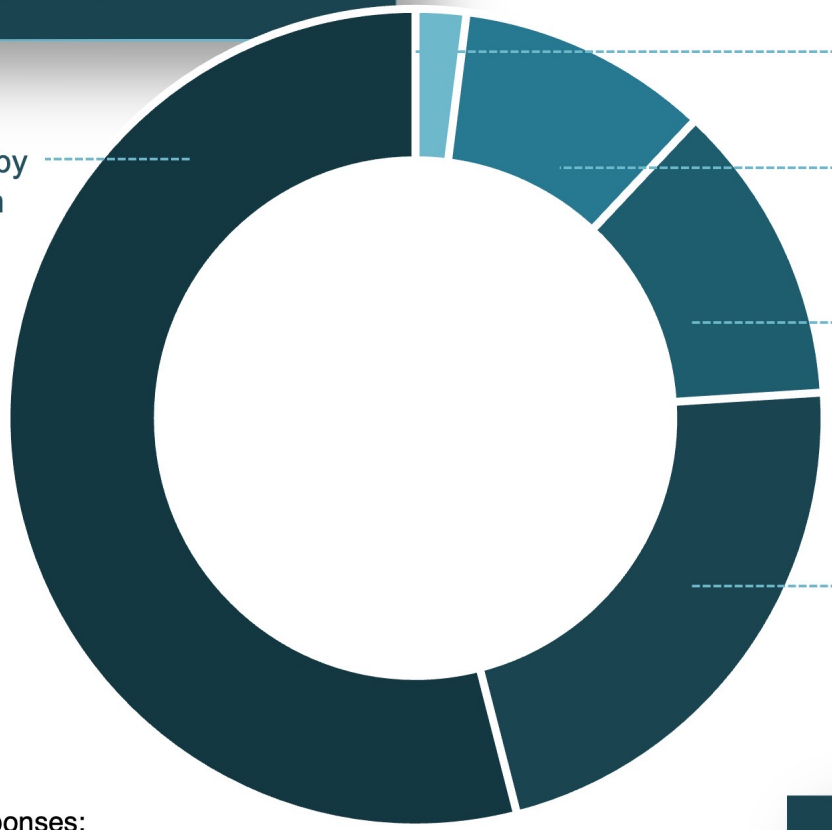
How is your company currently handling cleansing, harmonizing, enriching, and staging the data so it can be used in Enterprise Planning (TPMx, RGM, etc.)?

Fifty-four percent of Consumer Packaged Goods (CPG) companies handle their data internally. However, as artificial intelligence continues to evolve, there is an opportunity to automate processes and enhance efficiency by reducing manual tasks. Organizations must address issues of inconsistency and scalability, which require effective business oversight and industry expertise to maintain high-quality data.

Twelve percent of CPGs still struggle to manage this process, which will continue to be a barrier to quick insights and business decisions.

Twenty-two percent of CPGs lack a current process to cleanse, harmonize, enrich, and stage data, which puts them at a competitive disadvantage. Advanced analytics is dependent on high-quality data.

The Current State of Data Management Across CPG Organizations



Primary Other Responses:

- Mostly Internal with External Partner for One-time Clean Up

… a contributing factor to why execution breaks down today.

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Unlocking Enterprise-Scale Execution Through Data

- Unified, Real-Time Omnichannel Visibility
- Consumer & Customer-Specific Decisions
- Predictive & Prescriptive Intelligence (AI-Driven)
- Actionable Insights Utilized Throughout Planning and Execution

Data is foundational to retailer partnerships and realizing mutually profitable growth.



When manufacturers were asked whether they have challenges with retailers freely sharing foundational data (POS, Daily, Shopper, etc.), **67%** agreed that they do.

While these data sources are essential for analysis, **60%** of companies experience data quality issues and anomalies with external sources. If left unaddressed, these issues can result in inaccurate analyses and flawed outcomes.

A modern data foundation unlocks real execution power and allows organizations to move from insight generation to insight activation.

A modern data foundation transforms fragmented, manual data processes into trusted, AI-enabled intelligence—powering faster decisions, stronger retailer collaboration, and scalable execution across Holistic Enterprise Planning™ capabilities.

The goal for organizations is to achieve data-driven intelligence and insights based on a single "one version of the truth."

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What's Required to Scale Data-Driven Execution in 2026

1. **Ownership & Accountability**
   Clear data ownership across Sales, Finance, Supply Chain, and Marketing
2. **Trust & Adoption**
   Data literacy, governance, confidence, and cross-functional alignment
3. **Automation & AI Enablement**
   Move from manual cleansing to automated data ingestion and harmonization
4. **Embedded Intelligence**
   Insights delivered directly into TPMx, RGM, IBP, and Marketing workflows

Without trust in data, AI and advanced analytics cannot scale.



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Digital Transformation

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Digital Transformation

“ Digital transformation enables CPG organizations to deliver seamless, consumer-centric omnichannel experiences while accelerating decision-making, adaptability, and profitable growth through advanced analytics and AI. ”

Pam Brown
POI, CCO



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Digital Marketing Progress

In previous years, POI's State of the Industry findings showed that many companies believed they were behind their peers in digital marketing efforts.

As we head into 2026, **34%** of survey respondents reported a "lagging" response regarding their digital marketing efforts.

In the meantime, **10%** of respondents reported taking the lead on digital initiatives within the CPG industry.

Forty-two percent of respondents reported that their digital marketing efforts are on par with their peer set.

Fourteen percent are unsure. Organizations must break down silos and strengthen cross-functional partnerships, as digital marketing impacts nearly every internal business unit.

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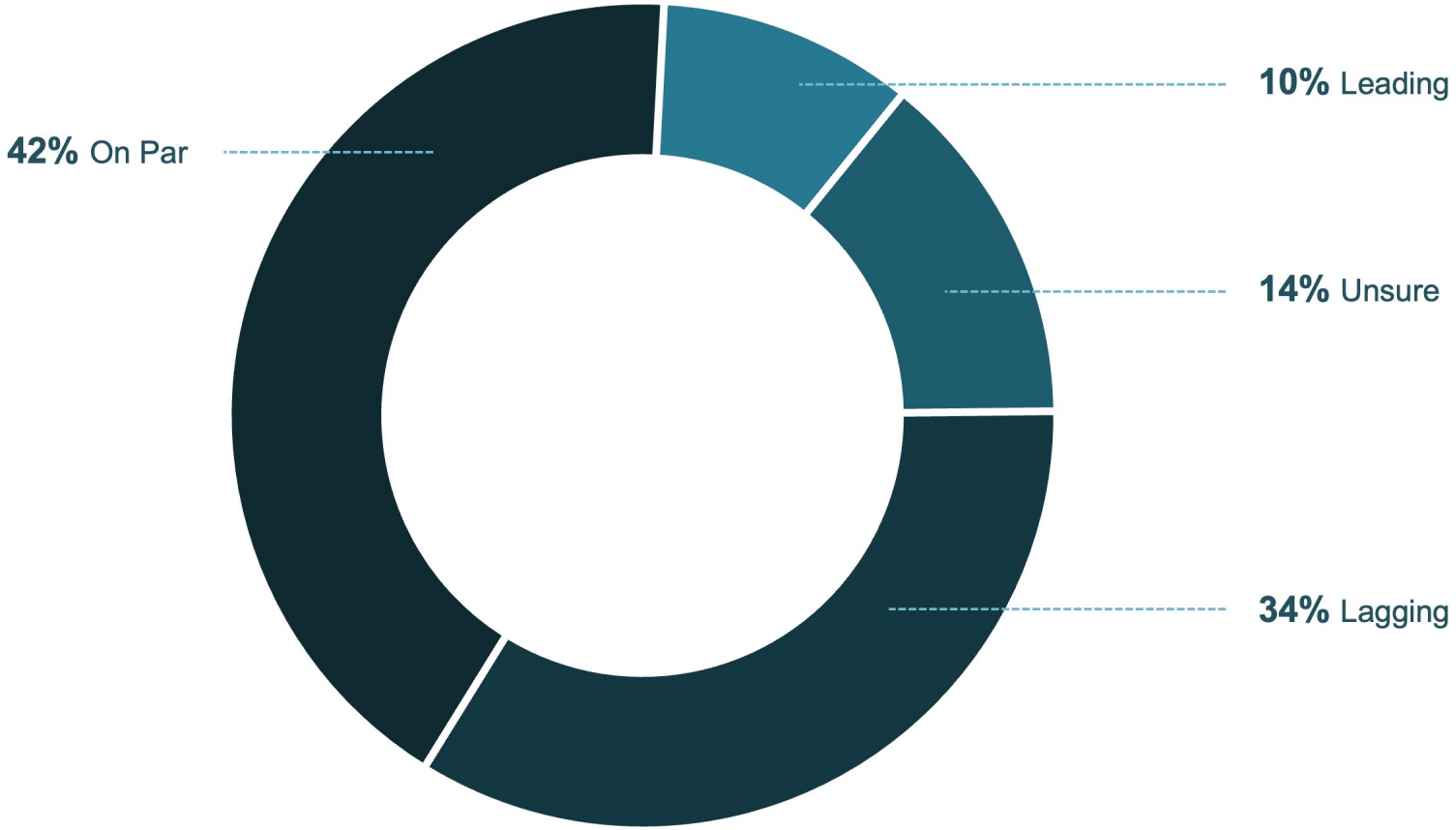
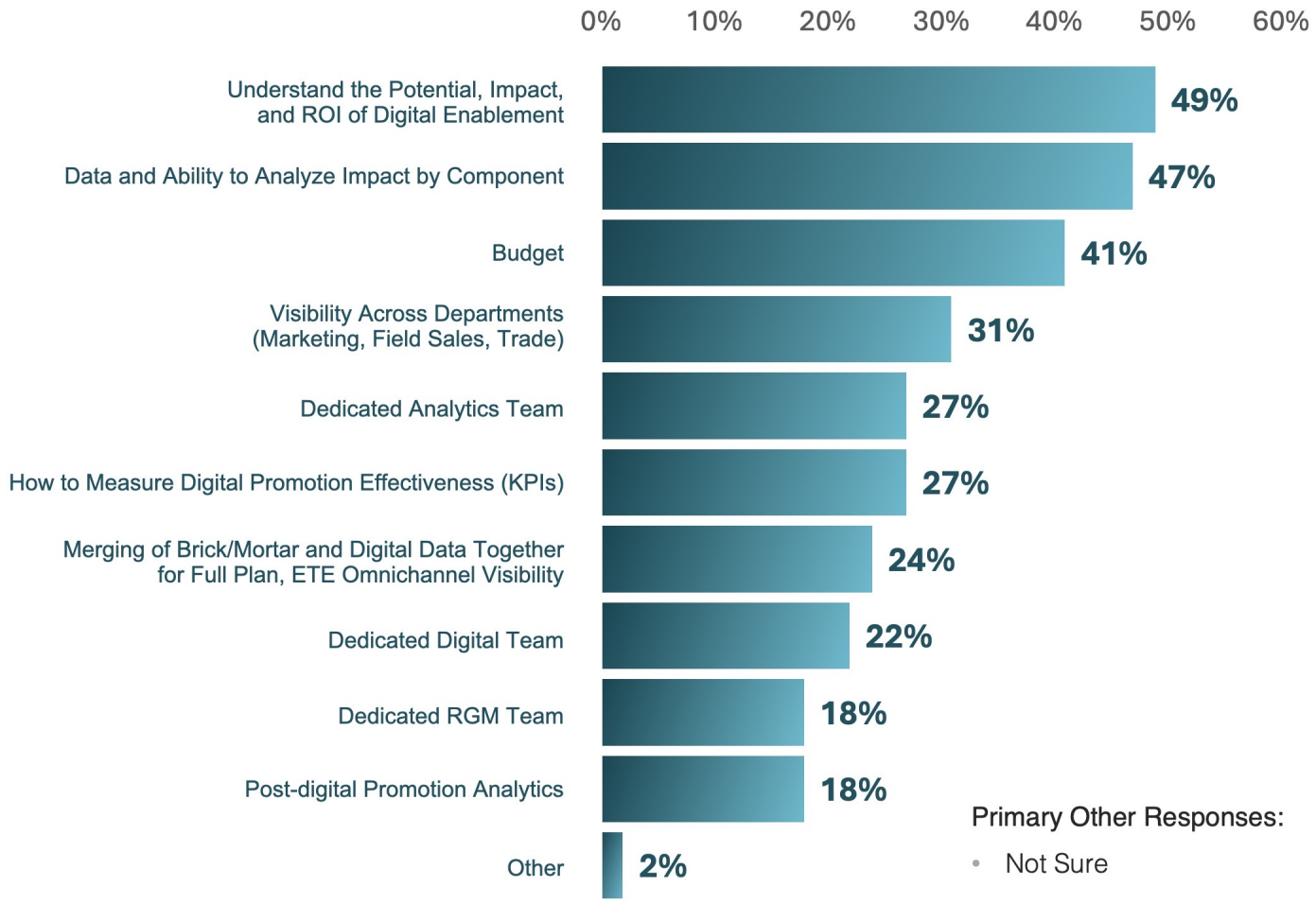
Do you feel your company's digital marketing efforts are on par with the market and your peer set?



34% of companies are lagging, and only **10%** are leading.
The majority of the industry is still catching up digitally.

What is needed to advance your organization's digital promotion capabilities? (Please select all that apply).



The industry's digital transformation is driving the need for consumer behavior modeling, advanced analytical capabilities like AI/ML, agentic AI, etc., plus new or upskilled roles to manage these capabilities.

Respondents note the following aspects are necessary to take their digital practice to the next level:

A successful digital practice begins with securing the necessary digital budgets, with **41%** of respondents identifying this as an essential need.

Additionally, achieving visibility across departments is needed for **31%** of respondents.

As digital practices evolve, **22%** of respondents indicate a need for a dedicated digital team, while **27%** emphasize the need for a dedicated analytics team. These teams must also be able to evaluate digital ROI to understand the potential impact and return on investment of digital initiatives, which is a priority for **49%** of respondents. (Top 2026 need)

Furthermore, these teams must determine how to measure the effectiveness of digital programs and key performance indicators (KPIs), as noted by **27%** of respondents. They also need to assess the data foundation and availability and analyze the impact of various components, with **47%** highlighting this necessity.

Moreover, **24%** of respondents need to integrate brick-and-mortar and digital data to create a comprehensive end-to-end omnichannel plan is crucial for understanding where to allocate future investments. However, most companies currently lack the capabilities to achieve this integration. **POI views the merging of data and visibility as vital for enhancing enterprise profitability and overall strategic direction.**

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How would you characterize your current linkage between digital promotions and traditional trade promotions?

According to POI's survey, 22% of companies reported having no connection between digital and trade promotions.

While some teams have limited visibility and coordination, **only 30%** work in a coordinated manner. This is due to the traditional organizational structure of working in silos.

For optimal performance, traditional trade promotion and digital promotion teams must be more closely linked.

Each group analyzes, creates, and executes programs they deem the best fit for the brands, which can lead to duplication of efforts. This results in wasted spending and missed opportunities to amplify plans across the omnichannel landscape. Incrementality measurement is evolving in the industry, which can help drive visibility and partnership around holistic digital and trade fund planning.

Organizations must enhance visibility and collaboration between digital and trade promotion teams.

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Holistic Enterprise Planning™

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Holistic Enterprise Planning™ Evolution



Improved ROI
Through post-event analytics and other promotion and pricing efficiencies.



Optimization/RGM (AI/ML)
Enterprise promotion, pricing, trade architecture/ segmentation, mix management, and assortment. (Not just the KAM lens)



Improved Visibility
Enterprise visibility across the functions. Goal is one version of the truth.



User Interface (UI)
Robust yet intuitive platforms with improved visualizations, interactive calendar planning, fewer clicks, dashboard, and reporting.

Evolution to TPMx → Holistic Enterprise Planning™ (EPx) → Evolving Digital/Omnichannel

Prior to 2019

Excel, TPM, ROI, or TPO

Fragmented planning across Excel, TPM, ROI, and TPO created duplication, limited insight, and manual effort.

2019

Excel, TPMx (TPM/What-if/ROI)

TPMx platforms unified promotion planning, what-if scenarios, and post-event ROI, reducing rework and improving planner productivity

2020-2022

Excel, RGM Suite, EPx

Advanced planning beyond traditional sales roles. Released HQ Planning, Revenue Growth Management, some Marketing planning & IBP capabilities. TPO terminology was retired with the advent of RGM Suites, which included advanced promotion and pricing optimization pillars. AI/ML was embedded to advance modeling and reduce the planning burden.

2023-2026+

RGM Suite, Enterprise Planning (EPx)+ Digital, and Omnichannel

Utilizing consumer data to drive Sales and Marketing planning. Enhanced focus on developing an enterprise, omnichannel, end-to-end value chain approach. Advancing AI/ML models. Focus on a total investment optimization framework.

Planning has evolved from being solely a sales process to encompass broader enterprise planning and governance.

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The Holistic Enterprise Planning™ Evolution Continues:

- **Connected Capabilities**
  Leading manufacturers are connecting TPMx, RGM, and IBP to accelerate and scale decision-making
- **Unified Investment Optimization**
  Trade, pricing, and retail media must converge into a single commercial investment framework
- **AI Maturity + Adoption**
  Performance differentiation now depends on both AI capability and organizational adoption



Change management is a prerequisite — not a downstream activity.

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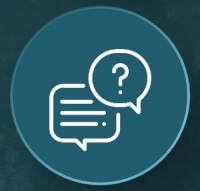
POI Summit & Manufacturer Connect Insights on Enterprise Planning Pain Points / Opportunities



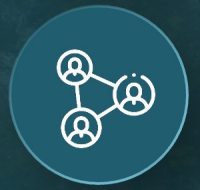
Fragmented, ungoverned data undermines trust and accountability



Slow, manual analysis limits insight velocity



Incomplete visibility across total commercial spend (trade + digital + retail media)



Enterprise teams need to use common denominators for holistic enterprise planning™ across cross-functional teams to drive cohesiveness in data, results, and “one version of the truth



Legacy platforms constrain enterprise reporting and decision-making



Limited real-time collaboration weakens execution and forecast accuracy



Revenue Growth Management, headquarter dashboards, and reporting are needed to drive efficiency and effectiveness across the organization and to share with Retail partners



To effectively manage their businesses, leaders need a comprehensive view of the entire gross-to-net profit and loss (P&L) statement

Without enterprise-wide common denominators, “one version of the truth” remains aspirational.

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What Manufacturers Are Trying to Solve With Holistic Enterprise Planning™ Capabilities:



Automation – Reduce Burden

- Planning (AOP/HQ/Sales & Demand Planning)
- Baselines
- Enterprise Reports
- Analytics/ROI/Optimization
- RetX Perfect Store, Image Recognition & Connectivity
- 360 Consumer Insights



Gain Efficiency

- Inflation & Cost Management including Total Spend (Trade +)
- Supply Chain
- Omnichannel Balance, including Pricing
- Enterprise planning
- Customer Experience
- Price/ Pack Architecture
- Assortment
- Volume Forecasts

Holistic Enterprise Planning™ de-risks decisions by connecting planning, execution, and performance measurement.



Enterprise Visibility

- Enterprise Dashboards & Reporting
- Total Spend
- Enterprise Planning
- In-flight & In-store Execution
- Omnichannel Factors/Impacts
- Price Elasticities
- Price/Pack Architecture
- Assortment
- Volume Forecasts
- Supply Chain



Improve Process

- Data Management
- Enterprise Spend & Volume Planning
- Set Monthly Cross-Functional Connects
- IBP and JCBP
- TPMx/RetX Connectivity for In-flight Monitoring
- RetX Perfect Store
- Insights Consolidation and Socialization



One Version Of The Truth

- Baselines
- Lift Coefficients
- Enterprise Reporting and Financials
- Spend & Volume Forecast Calls
- Unified Approach De-risks Decisions

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Journey to Improve Efficiency and Effectiveness Through Holistic Enterprise Planning™

Data

TPM

- Transactional TPM
- Promotion Planning
- Baselines & Promo Uplift
- Financial Control
- Forecasting/Demand

Execution Insights

- Pre & Post Promotion ROI Analysis
- Base Vs. Uplift – ROI
- Analysis of Promotion Tactics

Prediction

- Advanced Baseline and Uplift Modelling
- Promotion Predictions – Multi Casual Modeling
- Pre & Post Forward Buy Effect
- Cannibalization Effects

Trade Simulation

- Constraint-based What-if Promotion Simulation
- Promotion-level Predictive Analytics and Modeling
- Promotion P&L

Strategic RGM

- AI Enabled Data Management
- Encompasses 5 Pillars of RGM
- Promotion, Pricing, Mix, Trade Architecture Optimization.
- Real Time Insights
- Profit Focused
- Incorporation of Consumer Behavior
- Category-level Analytics and Modeling
- Customer & Category P&L's
- Enterprise Revenue Mindset
- "One Version of the Truth"

Holistic RGM

- Prescriptive Planning
- Intelligent Optimization Across RGM Levers
- Advanced Non-linear Models
- Demand Shaping Insights
- 25+ Constraints with Total Category Decomposition
- Strategic War Gaming

Together, these capabilities deliver total Enterprise Planning (EPx) functionality.

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To transform trade efficiency and effectiveness our company needs to improve: (Select all that apply and rank importance)

2025/26 POI State of the Industry Survey Respondents Stated:

	2025/2026	24/2025	23/2024
Data Cleanliness & Management	1	2	5
Post-event Evaluation (ROI Analysis)	2	3	1
Using Holistic Baselines, Elasticities, Lifts, etc. Across org	3	-	6
Revenue Growth Management (Price/Promo/Mix etc.)	4	5	-
What-if Promotion Scenarios	5	4	3
Volume Planning Accuracy	6	1	2
Mix Optimization	7	-	-

2026 marks the shift from promotion efficiency to total portfolio optimization.

Key Priorities for 2026

Reaffirming Foundational Excellence
The focus on quality data management continues to be a key foundational area for delivering accurate and actionable insights. Survey respondents reaffirm that post-event analysis, RGM, and predictive promotion simulations remain critical priorities for 2026. Holistic baselines/elasticity work and mix optimization are new priorities to the list this year.

Data Cleanliness and Management remain critical, as organizations recognize that advanced models and optimization require high-quality data.

Post-event Evaluation (ROI Analysis) is essential for year-over-year planning improvements. Since POI's 2018 survey, this has ranked among the top four priorities. It provides a quick path to enhancing promotion effectiveness.

Revenue Growth Management has remained among the top seven priorities, ranking #4.

What-if Promotion Scenario predictive simulations are invaluable for sales and Revenue Growth Management (RGM) teams. They enable them to analyze promotion timing, duration, discount depth, and other variables to identify the most effective strategies for retailers and organizations.

Volume Planning Accuracy remains a key priority for 2026, but for the first time since 2023 has dropped out of the top two priorities.

Mix Optimization: Making its first appearance in the top 7, effective Mix Management is essential to optimize profitability and respond to evolving market dynamics. By leveraging advanced analytics and holistic planning capabilities, organizations can strategically balance product assortment, pricing, and promotional investments.

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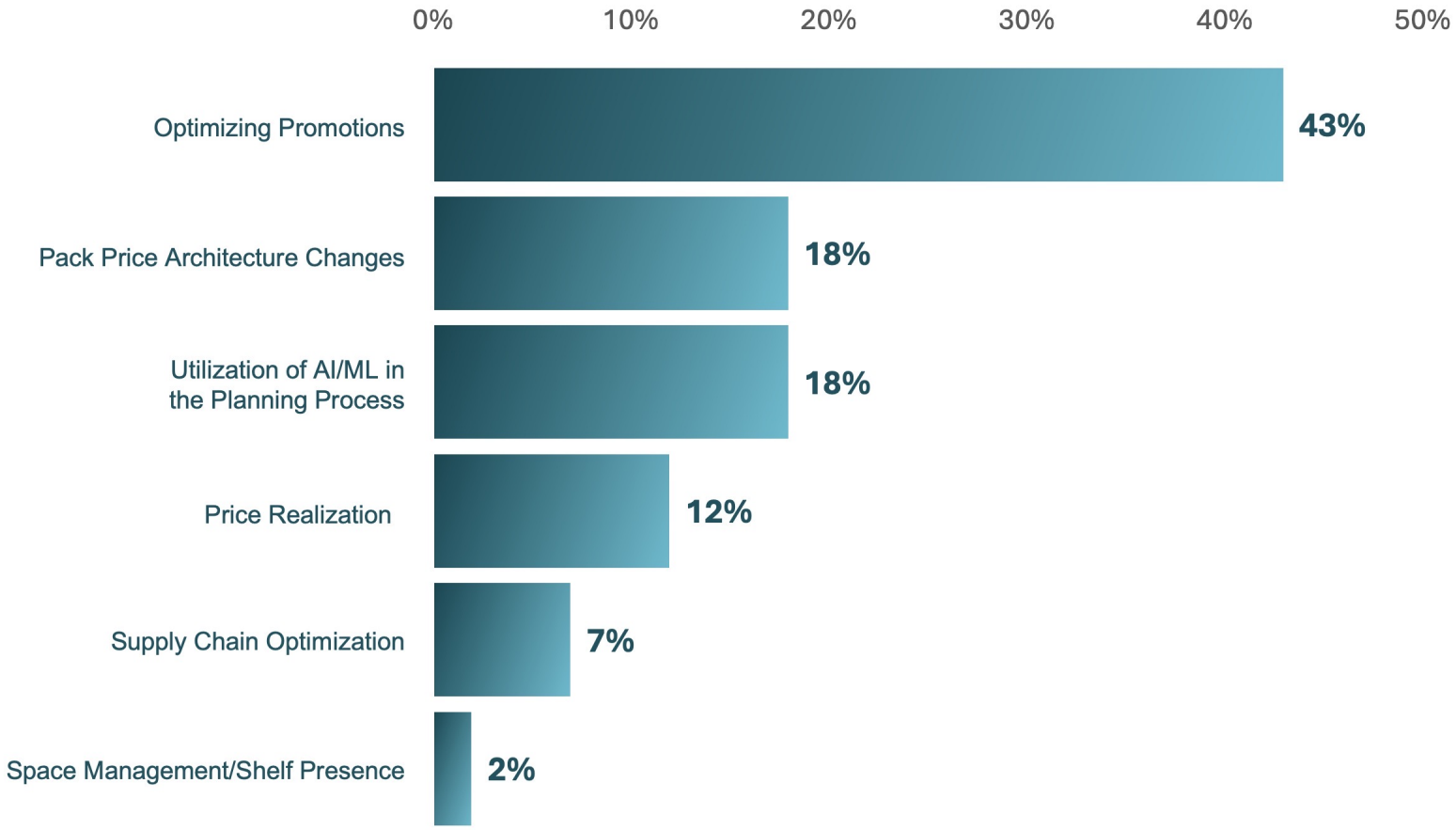
RGM Capabilities: A Key Driver Of Growth

75% of Companies Rank RGM Capabilities Among Their Top 4 EPx Growth Areas

Your organization's biggest Enterprise Planning (EPx) growth opportunity for 2026:



Optimizing promotions remains the top growth opportunity for organizations in 2026, according to **43%** of respondents.

This is closely followed by pack price architecture changes **(18%),** highlighting a strong focus on revenue management strategies. Utilization of AI/ML in the planning process **(18%)** and Price realization **(12%)** are also critical areas, reflecting the growing need for operational excellence in a dynamic market environment.

Additionally, supply chain optimization **(7%)** and space management/shelf presence **(2%)** underscore the importance of structural and strategic adaptability in driving growth.

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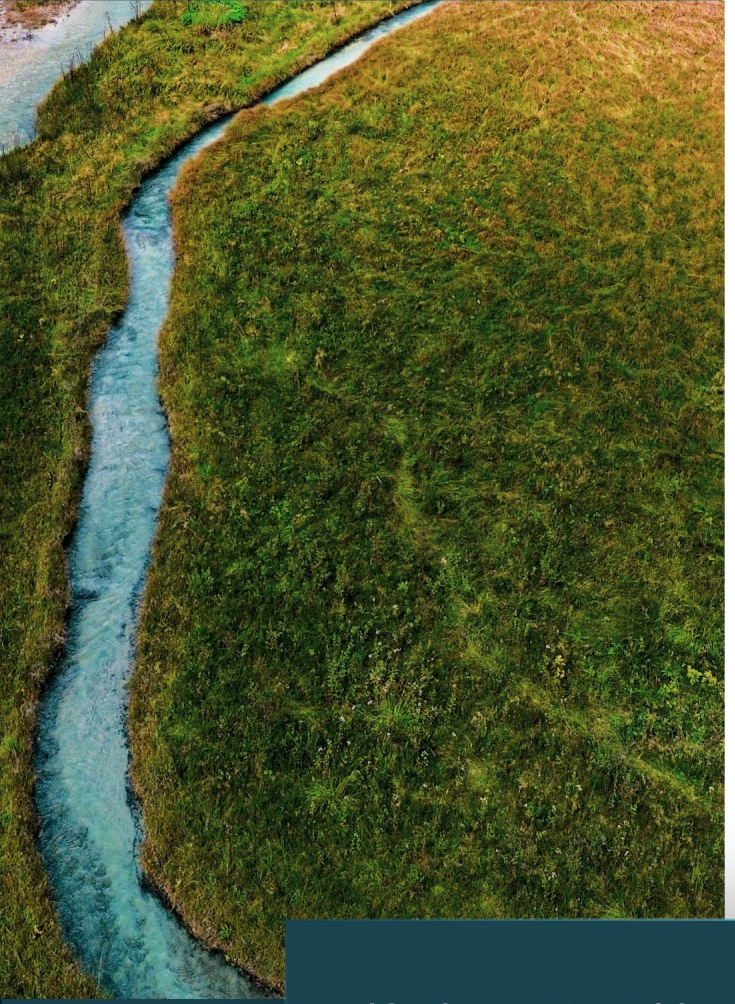
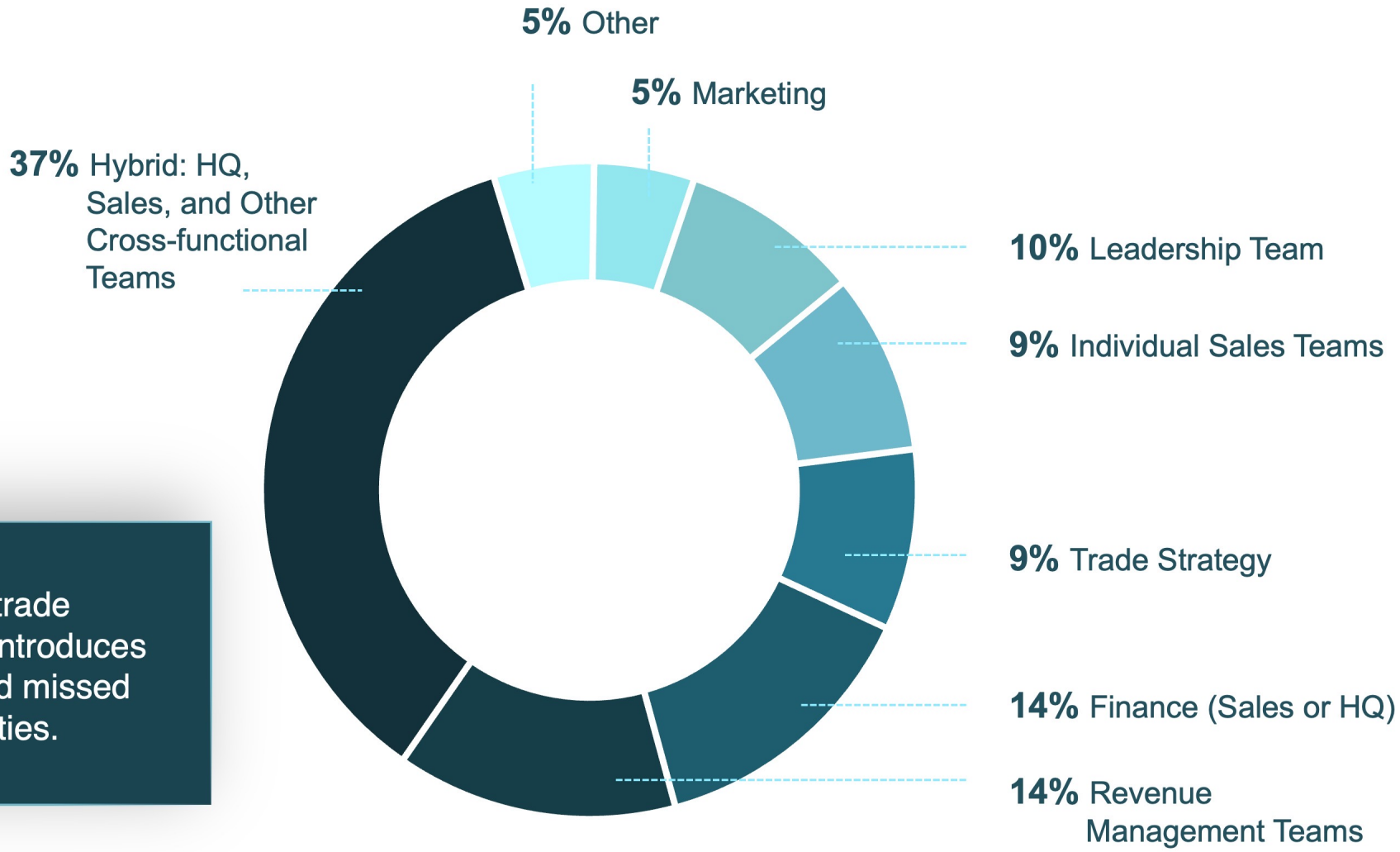


Who makes the decisions around Enterprise Planning (EPx) Trade Investment allocation in your organization? (Please select the primary decision maker):



Unclear ownership of trade investment decisions introduces risk, inconsistency, and missed optimization opportunities.

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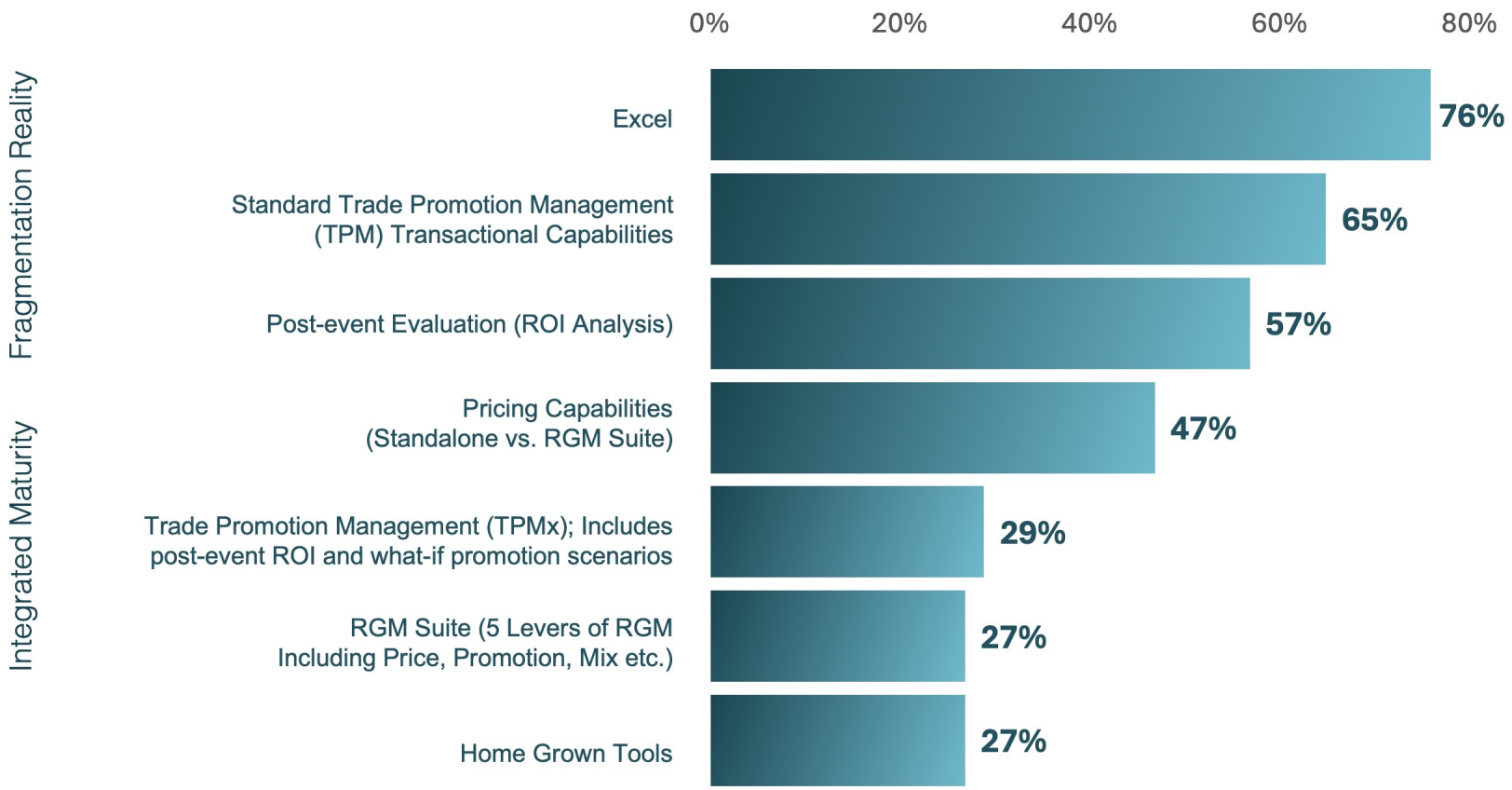
Enterprise Planning Remains Fragmented Across Most Organizations

Despite widespread automation, integrated EPx adoption remains limited

Which of the following Enterprise Planning (EPx) technologies does your company currently use to manage & drive trade efficiency? (Select all that apply)



TPMx + RGM together form the Holistic Enterprise Planning™ (EPx) ecosystem.

Most manufacturers still operate in fragmented planning environments, despite the availability of integrated EPx capabilities.

Today, most vendors can deploy planning capabilities in one seamless, holistic TPMx planning platform, including trade promotion management (TPM), what-if promotion scenarios, and post-event ROI analysis.

Companies increasingly use RGM capabilities to uncover efficiencies, especially in promotion, pricing, and mix effectiveness, which have become critical priorities.

Yet,

- Excel remains deeply embedded in enterprise planning
- Integrated TPMx and RGM adoption lags foundational tools
- Fragmentation limits enterprise visibility and investment optimization

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Manufacturer Investment Conviction is high for Enterprise Planning Capabilities

According to the POI survey, 51% of respondents reported that their organizations plan to implement new TPMx systems.

Integration is a top 2026 priority — not point solutions.

TPMx remains a primary entry point to EPx maturity.

RGM capabilities are increasingly important as they enhance investment efficiency.

TPMx is the gateway.
RGM is the multiplier.
EPx is the outcome.

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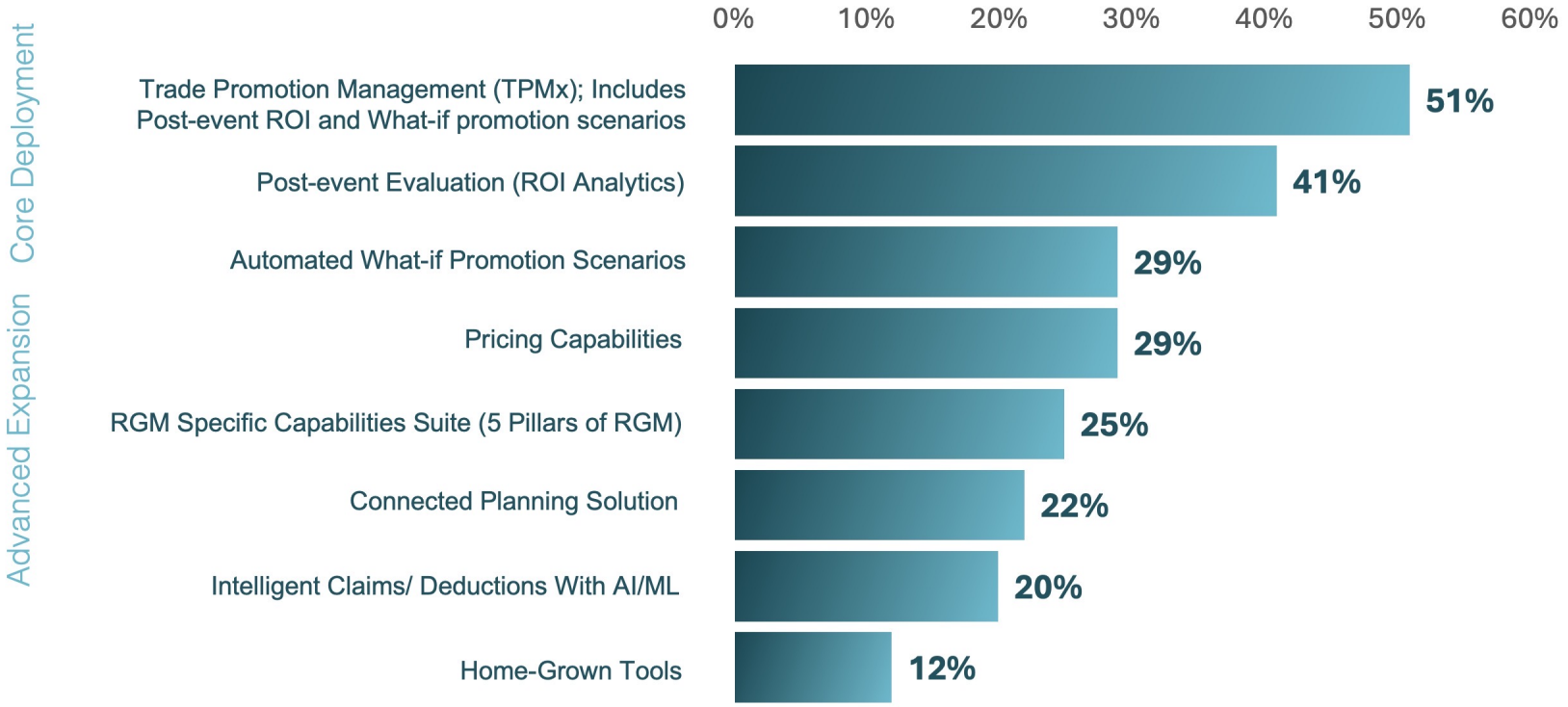
Manufacturers Are Moving From Fragmented Tools to Integrated Enterprise Planning

Which of the following Enterprise Planning technologies will your company deploy in 2026? (Select all that apply)



Enterprise planning maturity is increasingly defined by governance, guardrails, and visibility, not just tools.



> “Holistic Enterprise Planning™ is the connective tissue between strategy, execution, and performance, enabling manufacturers to move from reactive planning to proactive value creation.

Pam Brown
Chief Commercial Officer,
Promotion Optimization Institute (POI)

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Trade Promotion Management

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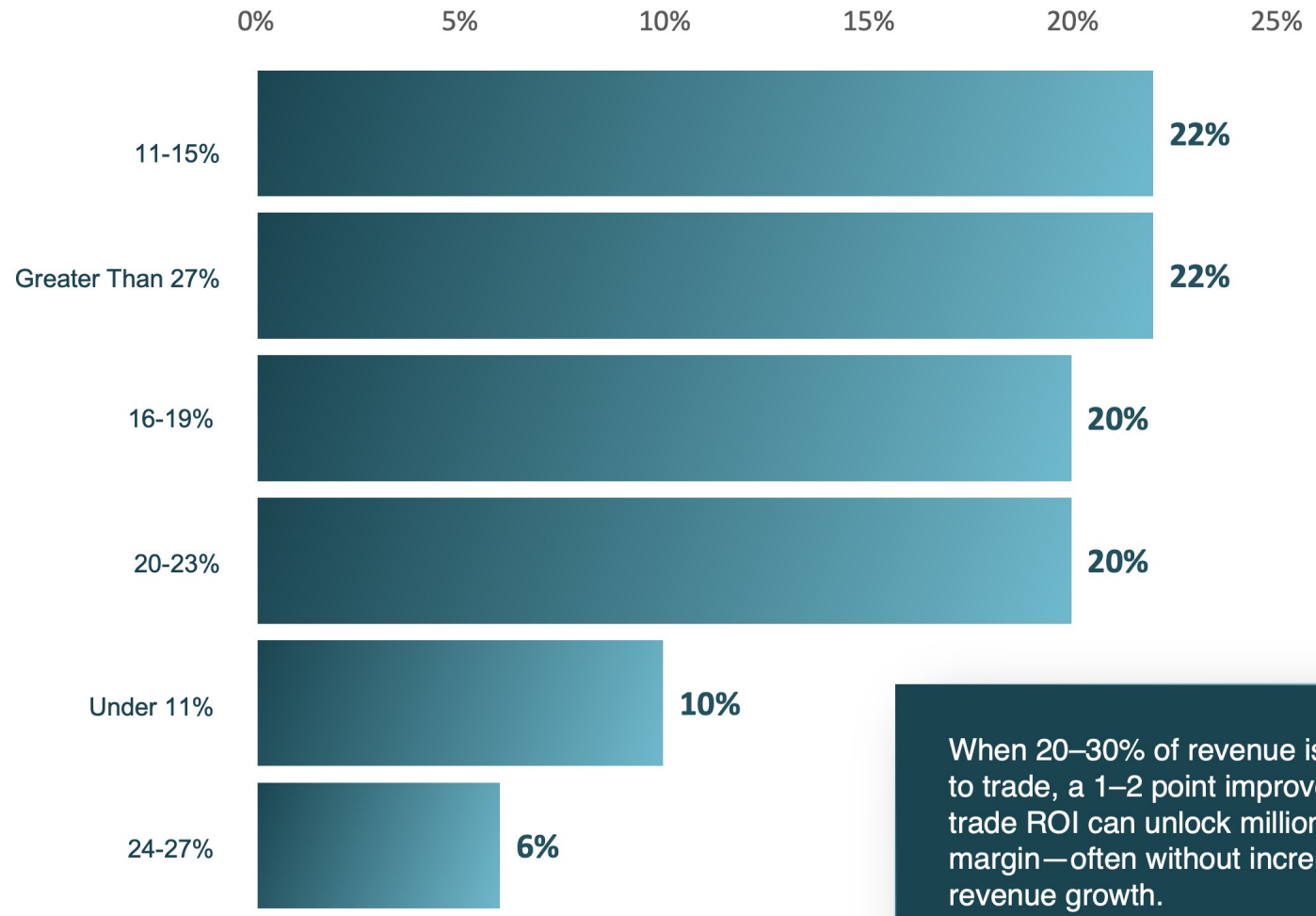
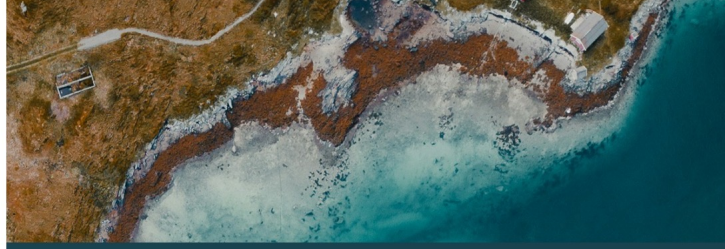
Trade Promotions Represent One of the Largest and Most Variable Uses of Revenue

What percentage of your annual revenue do you spend on trade promotions?



When 20–30% of revenue is allocated to trade, a 1–2 point improvement in trade ROI can unlock millions in margin—often without incremental revenue growth.



~ 68% of companies spend more than 15% of revenue on trade

Proper Allocation, Planning, & Monitoring of Trade Spend is Critical

Historically, CPG companies have spent between **11% and 27+%** of revenues on trade promotions.

Trade spend frequently represents the second-largest P&L expense after COGS.

A majority of companies operate with high or very high trade intensity.

Even small improvements in trade ROI can materially improve margins.

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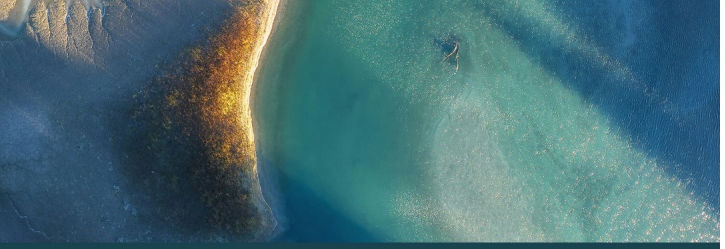

75% of companies struggle to manage modern trade complexity

Executives report moderate satisfaction—yet a clear majority struggle with modern trade complexity.

Trade management confidence is lukewarm, not strong.

Modern trade complexity (digital, eCommerce, DTC) is outpacing legacy capabilities.

Spend is expanding faster than enterprise-level visibility and control.

As trade spend expands across channels, “somewhat satisfied” is no longer sufficient.

Organizations need integrated trade planning, execution, and ROI measurement to avoid value leakage.

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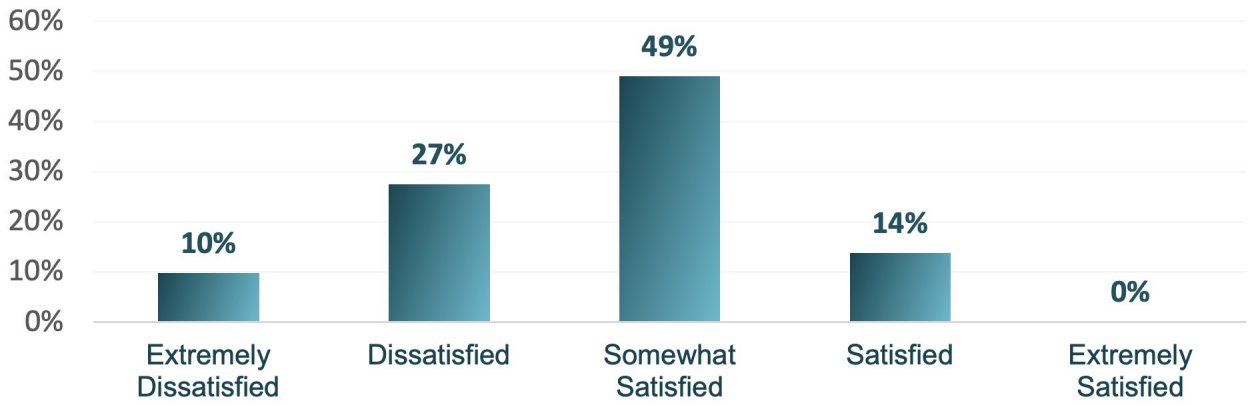
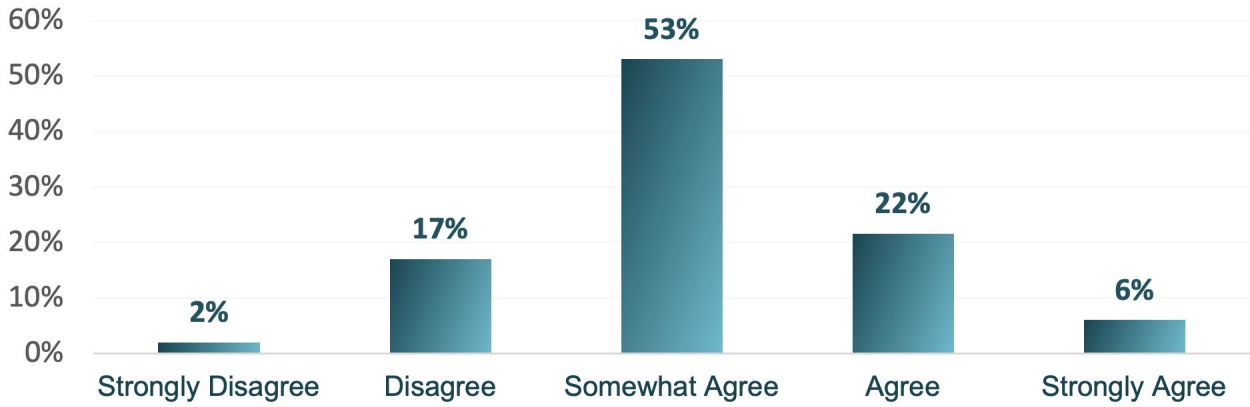
You are satisfied with your ability to manage trade promotions.

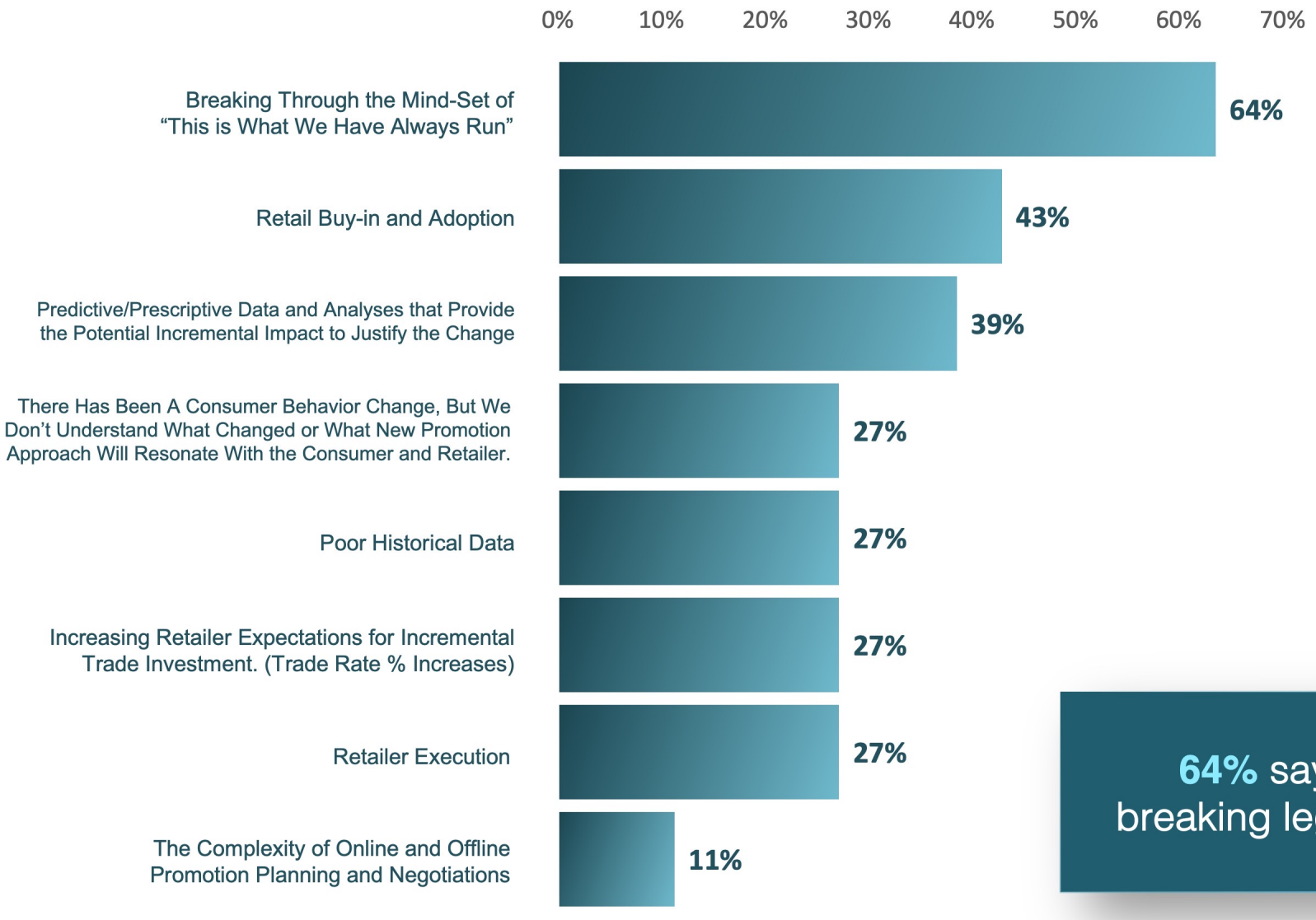


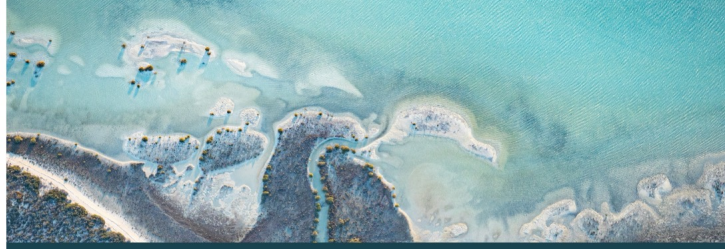
Your company struggles with managing modern trade and incorporating digital, shopper, eCommerce, D2C, etc.



Promotion Innovation Is Constrained More by Mindset

What are the biggest challenges when trying new promotion tactics?





Innovation stalls without clear, trusted proof of incremental value.

Repeating last year's promotions feels safe, but limits upside.

Retailers expect stronger ROI stories as trade investment increases.

Promotion innovation requires more than new tactics. It requires credible proof, retailer-aligned value stories, and disciplined test-and-learn governance.

Without these, organizations default to repetition over growth.

64% say the biggest barrier is breaking legacy promotion mindsets.

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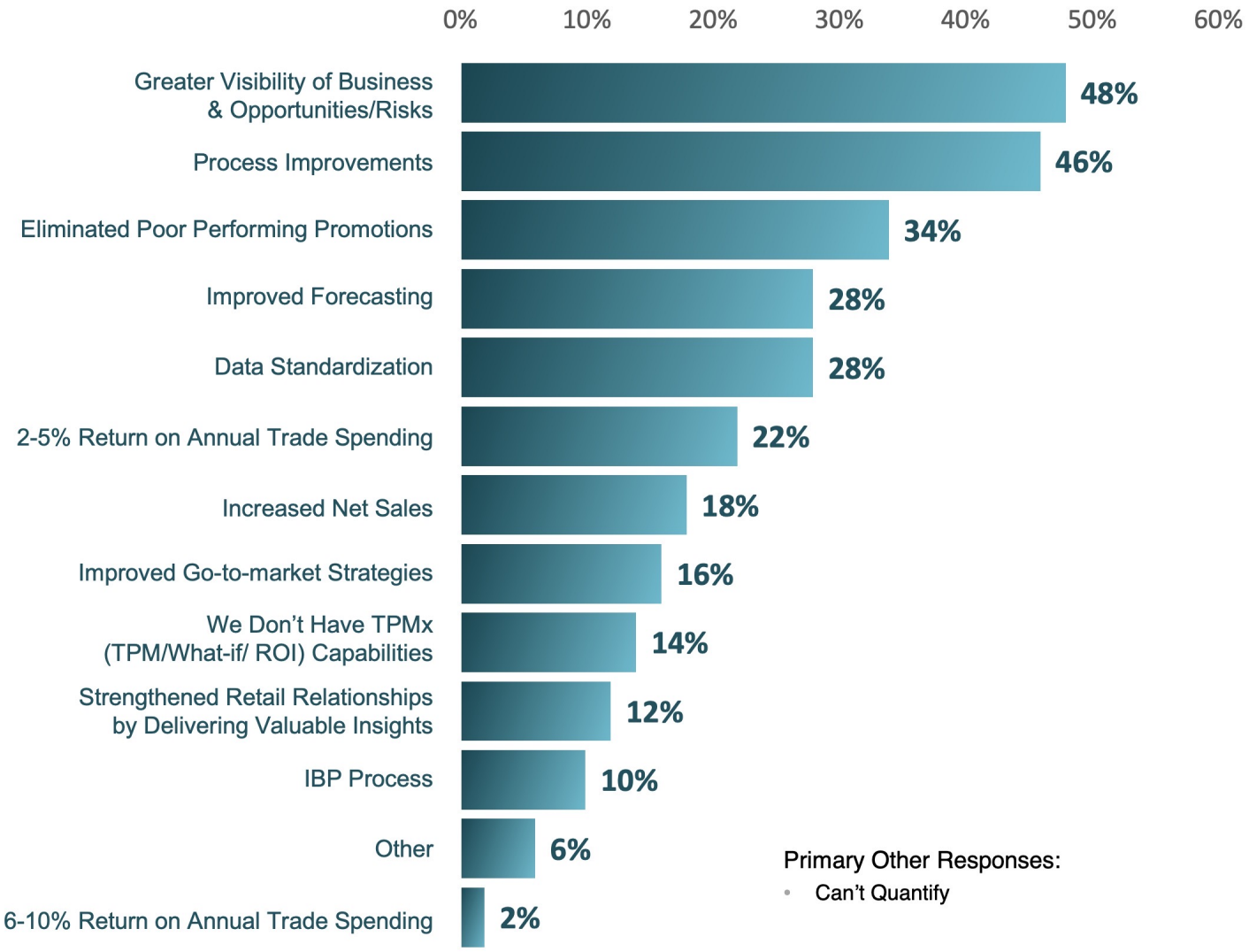
TPMx Delivers Visibility First— Then Measurable Efficiency and Financial Impact

What realized savings, efficiencies, & effectiveness has your organization gained from deploying TPMx?



Enterprise visibility and risk/opportunity clarity are the most immediate benefits **(48%)**, enabling better decision-making across trade investments.

Process improvements and standardization follow closely (**46%** process improvements; **29%** data standardization), reducing friction and manual work.

Ineffective promotions are identified and eliminated **(34%)**, improving trade efficiency and ROI quality.

Planning accuracy improves through better forecasting **(28%)** & more disciplined go-to-market execution **(16%)**.

Financial outcomes begin to materialize, with **22%** of companies realizing a 2–5% return on annual trade spend and **18%** reporting increased net sales.

TPMx value is realized in stages.

Organizations that establish visibility, standardization, and governance first are best positioned to unlock sustained ROI and net sales growth over time.

TPMx does not create value on its own. It enables organizations to systematically find, measure, and reinvest in trade effectiveness.

14% of companies still lack TPMx capabilities, limiting their ability to plan, test, and measure trade investments at scale.

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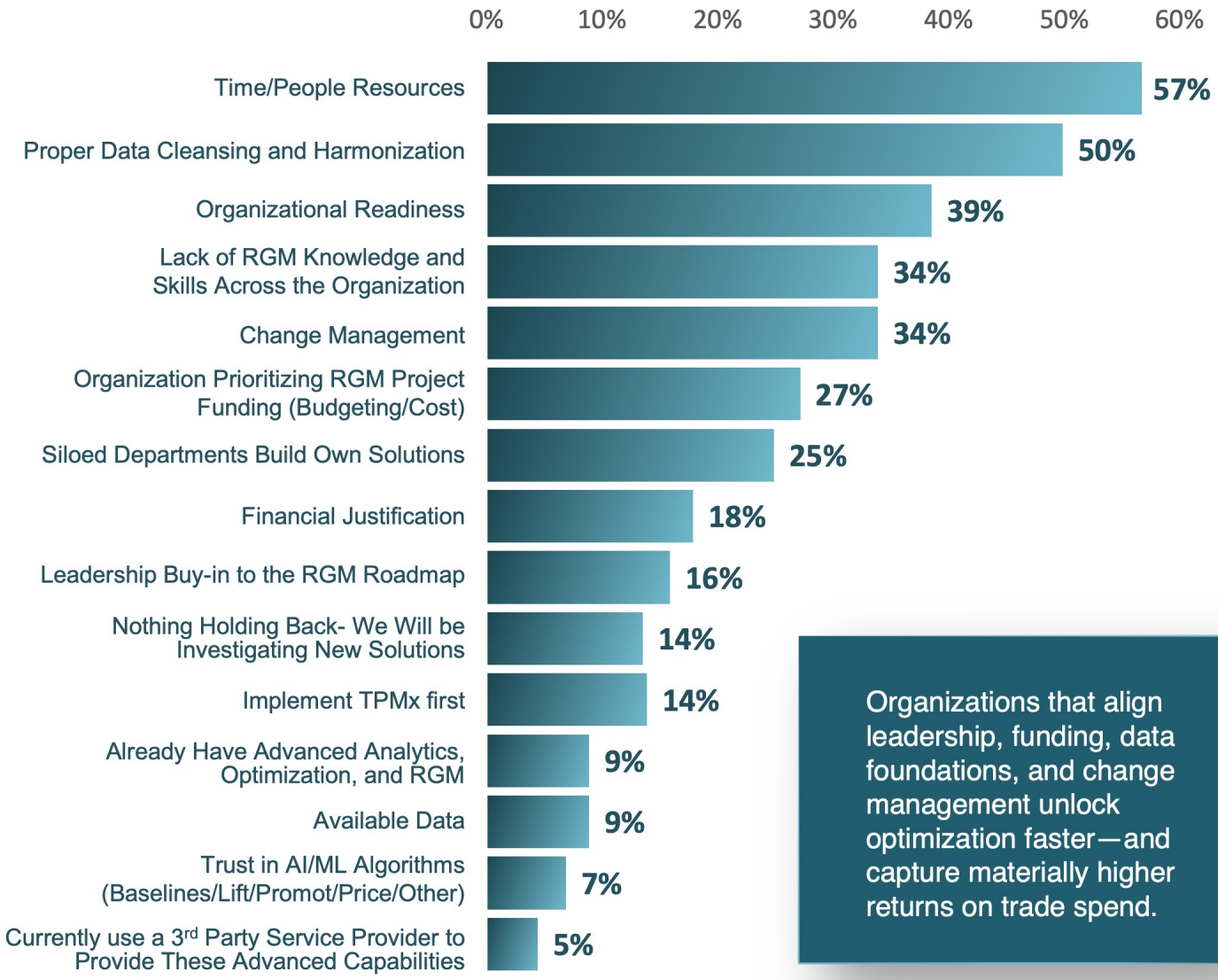
What is holding your organization back from moving capabilities from TPMx transactional capabilities to the RGM pillars of advanced trade promotion optimization & analytics?



Organizations that align leadership, funding, data foundations, and change management unlock optimization faster—and capture materially higher returns on trade spend.

Organizations Are Stalled in TPMx

Organizational Readiness, Not Technology, Is the Primary Constraint

Capacity & Resourcing Constraints

- Time and people limitations remain the top barrier **(57%)**
- RGM initiatives compete with near-term commercial priorities, slowing momentum

Data Foundation Gaps

- Data cleansing and harmonization limit analytics adoption **(50%)**
- Inconsistent baselines reduce confidence in optimization outputs

Organizational & Change Readiness

- Readiness and change management challenges persist **(39% / 34%)**
- RGM skills and knowledge gaps remain widespread **(34%)**
- Siloed teams continue to build isolated solutions **(25%)**

Governance, Funding & Leadership Alignment

- RGM funding prioritization remains inconsistent **(27%)**
- Leadership commitment to an RGM roadmap lags execution needs **(16%)**
- Financial justification often focuses on cost, not value creation **(18%)**

Advancing from TPMx to RGM is an operating-model decision, not a software upgrade.

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Retailers are receptive to new promotion ideas when value is clearly demonstrated.

Nearly half of organizations continue to anniversary last year's plans due to execution risk or historical habits.

The limiting factor is not retailer openness, but internal readiness and conviction that the new investment will be successful.

Organizations that invest in what-if simulation, post-event ROI analysis, promotion and pricing optimization, and repeatable value stories are best positioned to move beyond anniversary planning and unlock incremental growth at retail.

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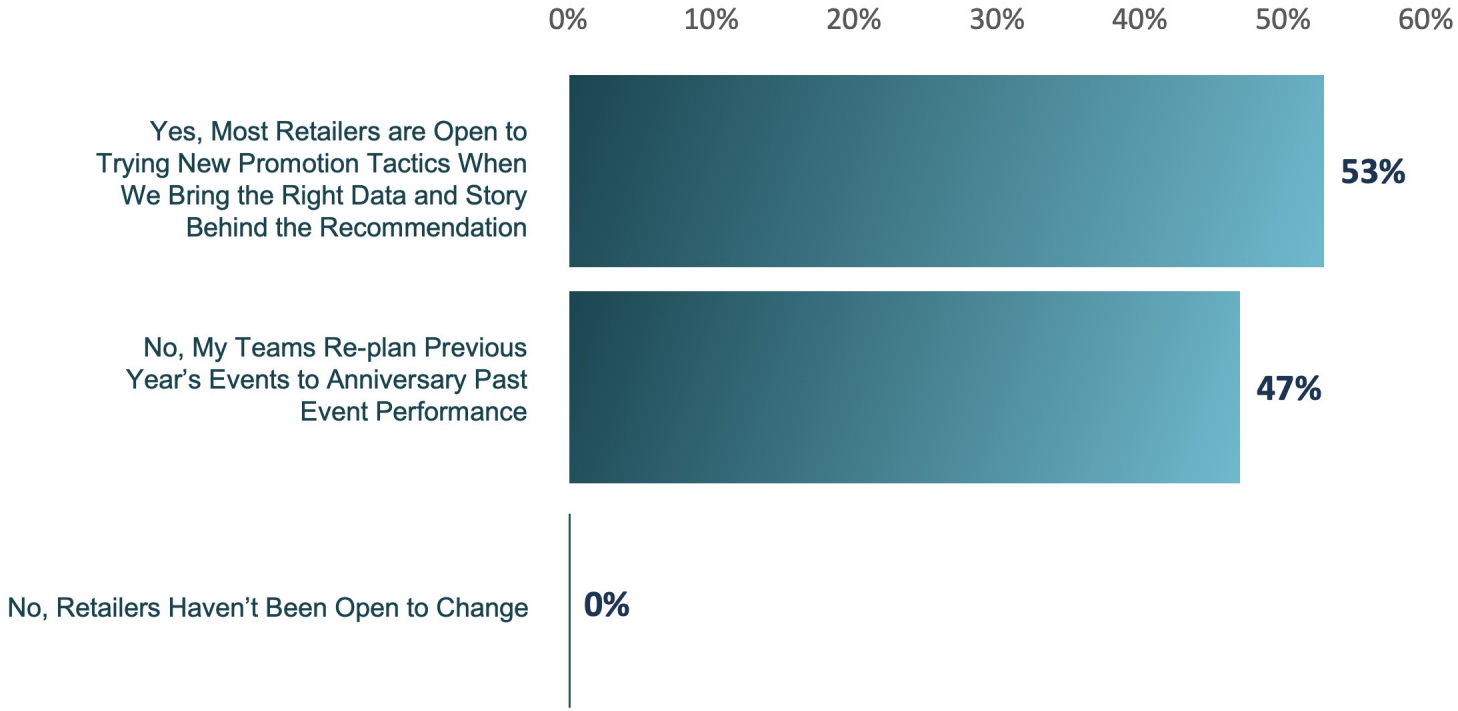
The Barrier to Promotion Reinvention Is Internal Discipline, Not Retailer Resistance

Has your organization been able to reinvent and sell new promotion strategies at retail?



Advanced TPMx capabilities enable teams to move from "what we ran last year" to "what we can confidently sell next."

Holistic Enterprise Planning™

People and Process Success Factors

14% of POI survey respondents note that they have not moved to a server-based TPMx solution (they use Excel to manage promotions) due to a lack of standardized process, **21%** due to cost, **16%** due to integration issues, and **16%** because the project hasn't been internally prioritized. In addition, **53%** of respondents noted that when implementing their TPM/TPMx solution, their vendor and/or services team provided best practices.



Change management plays a pivotal role in successfully implementing new processes and platforms for organizational transformation. To ensure progress and capability enablement, project teams must leverage best practices provided by vendors and avoid rigidly adhering to outdated company processes that could hinder innovation. Overcoming the "this is how we've always done it" mindset is essential for driving meaningful change. **32%** of organizations that lack best practices guidance likely encounter significant challenges in user adoption, process optimization, and tool effectiveness. These challenges often undermine user experience and diminish the overall return on investment (ROI) of the project.



Imagine having an optimized and automated annual operating plan that allows for quick internal evaluation, management, and adjustment as needed. This includes automating and optimizing trade allocations, pricing, promotion plans, mix, go-to-market strategies, and other aspects of the plan.

The administrative burden would be eliminated, and your team would be able to transform from tactical to strategic. By enabling these capabilities, your organization could swiftly respond to opportunities and navigate uncertainty.

If your company is looking to advance Enterprise Planning capabilities, please refer to the POI 2025 Vendor Panorama, https://poinstitute.com, to dive deeper into the topic and understand vendor capabilities.

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Your Guide to Vendor Capabilities

(EPx, RetX, TPM, What-if, ROI, RGM/TPO, Foodservice & Pricing)

Current and relevant insights to help you on your Enterprise Planning journey!

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Revenue Growth Management

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Revenue Growth Management

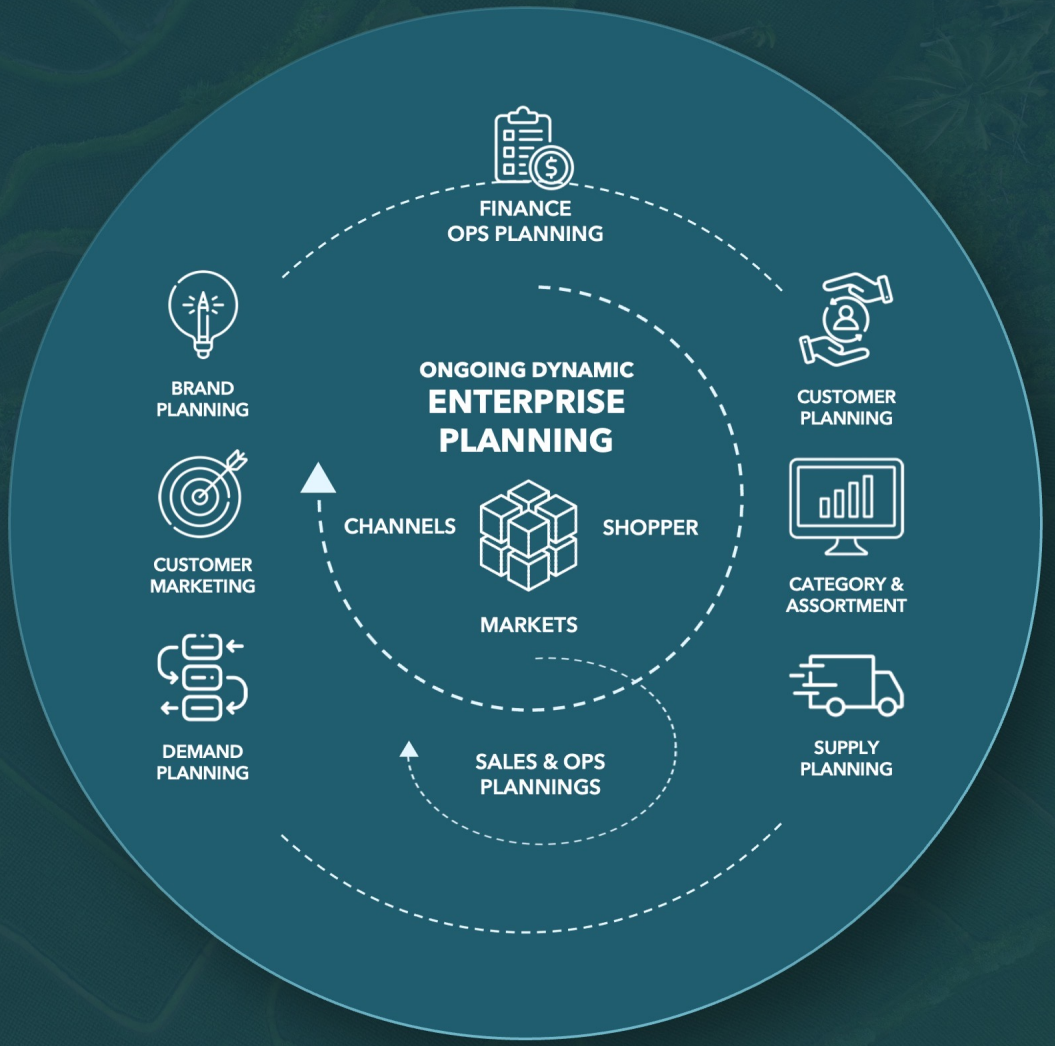
Driving Resilience and Market Leadership Through RGM Excellence

In today's unpredictable economic landscape, organizations that embed Revenue Growth Management (RGM) at their core don't just survive—they lead.

By uniting marketing, finance, supply chain, and sales into a single, agile force, we unlock real-time visibility and decisive action across the enterprise. Advanced analytics help us optimize pricing, product mix, and trade investments, transforming disjointed efforts into a unified, successful strategy. When this RGM mindset is deeply embedded into our culture, especially within the CPG sector, we can better anticipate shifts in consumer behavior and outpace the competition with speed, precision, and conviction.

Enterprise Planning Goal:
Have the right messaging, the right product, at the right price, with the right promotion, in the right location, and at the right time for the consumer.

Organizations committed to strategic, resilient growth empower agile RGM teams to turn disruption into decisive action – rapidly meeting consumer, retailer, distributor, and enterprise needs, no matter the challenge.



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Revenue Growth Management (RGM) Teams Lead a Holistic Ongoing & Dynamic Enterprise Approach

RGM LEVERS	Price Strategy & Architecture	Promotion Strategy & Management	Mix/Assortment Management	Investment Architecture, ROI & Trade Optimization	Portfolio & Brand Strategy Including Innovation
High-Level RGM Capabilities/ Work Streams	• Pricing Analytics • Advanced Pricing Optimization	• What-if Promotion Scenarios • Promotion Evaluation (Pre/Post)	• Mix Management • Assortment Management	• Investment Architecture • ROI Analysis • Advanced Trade Optimization • Segmentation	• Portfolio & Brand Strategy • War-gaming

Foundational Enablers

- Advisory/Consultant Services – By Pillar or Across Levers
- Change Management, User Adoption, Incentives
- RGM Simultaneous Cross-Lever Optimization
- Advanced Modeling (incl. AI/ML) and Analytics Layer
- Foundational Data: Cleansed, Harmonized, and Staged (including Consumer Behavior and Insights)
- Platform Architecture, User Interface, Integrations to other Enterprise Planning & In-Store Execution Capabilities

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RGM LEVERS	Price Strategy & Architecture	Promotion Strategy & Management	Mix/Assortment Management	Investment Architecture, ROI & Trade Optimization	Portfolio & Brand Strategy Including Innovation
Deeper Level RGM Capabilities & Analytics	• Price Elasticities • Price Ladders • Price Curves • Price Pack Architecture Analysis • Pricing Scenarios • Advanced Pricing Optimization	• What-if Promotion Scenarios • Pre-event Evaluation • Post-event Evaluation • Holistic Promotion Plan Re-design	• Sku Profitability • Mix Analysis and Management • Assortment Scenarios • Assortment Analysis and Management	• Trade & Investment Architecture Analysis (Gross-to-net/Profit Pools) • ROI Analysis • Advanced Trade Optimization	• Market Segmentation • Channel Management Analytics • Portfolio Analytics • Brand Analytics • Innovation Evaluation • War-gaming

Foundational Enablers
Advisory/Consultant Services – By Pillar or Across Levers
Change Management, User Adoption, Incentives, Negotiation Skills
RGM Simultaneous Cross-Lever Optimization
Advanced Modeling (incl. AI/ML) and Analytics Layer
Foundational Data: Cleansed, Harmonized, and Staged (including Consumer Behavior and Insights)
Platform Architecture, User Interface, Integrations to other Enterprise Planning & In-Store Execution Capabilities

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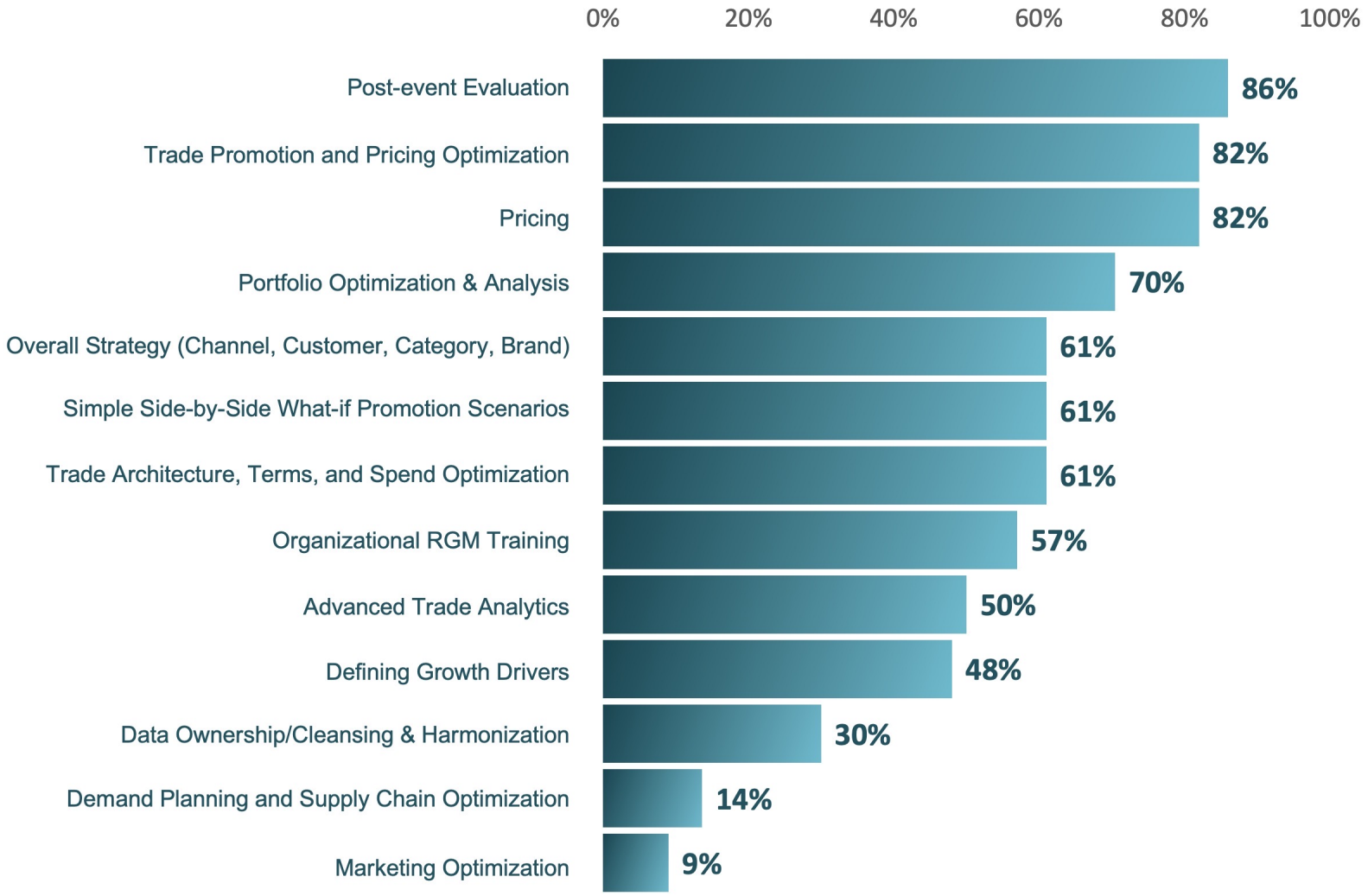
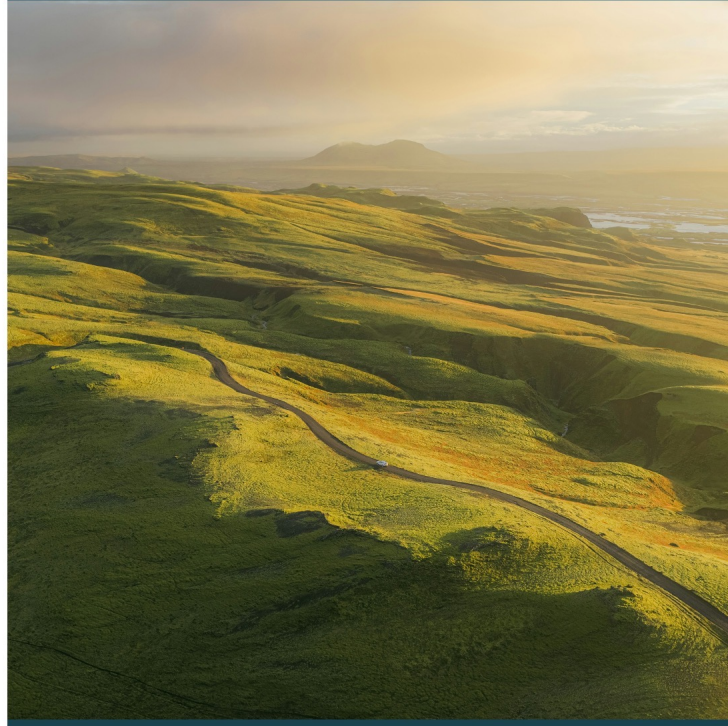
RGM Delivers Optimization & Insights Benefitting Enterprise Strategy & Resilient Revenue Growth

Your RGM practice includes the following business levers and analysis:





Top Performers Leverage ROI Analysis and Pricing Analytics—But Few Unlock the Full Power of RGM Across the Value Chain.

RGM's Next Frontier:
Incorporating Demand Planning and Digital Mastery

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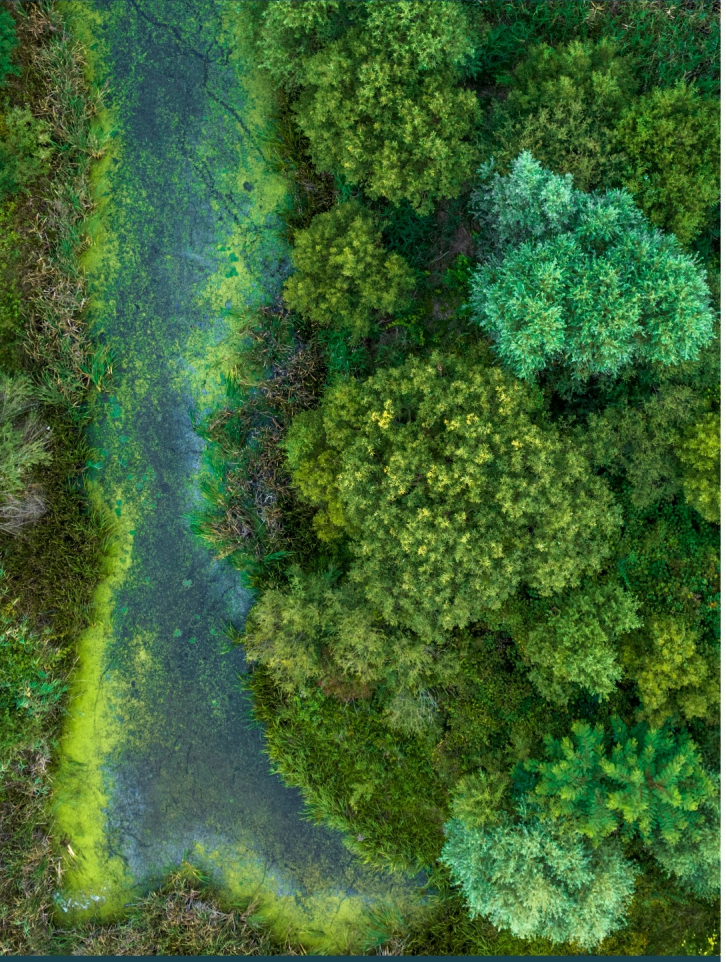

Organizations must elevate RGM from tactical execution to strategic alignment to drive sustainable growth.

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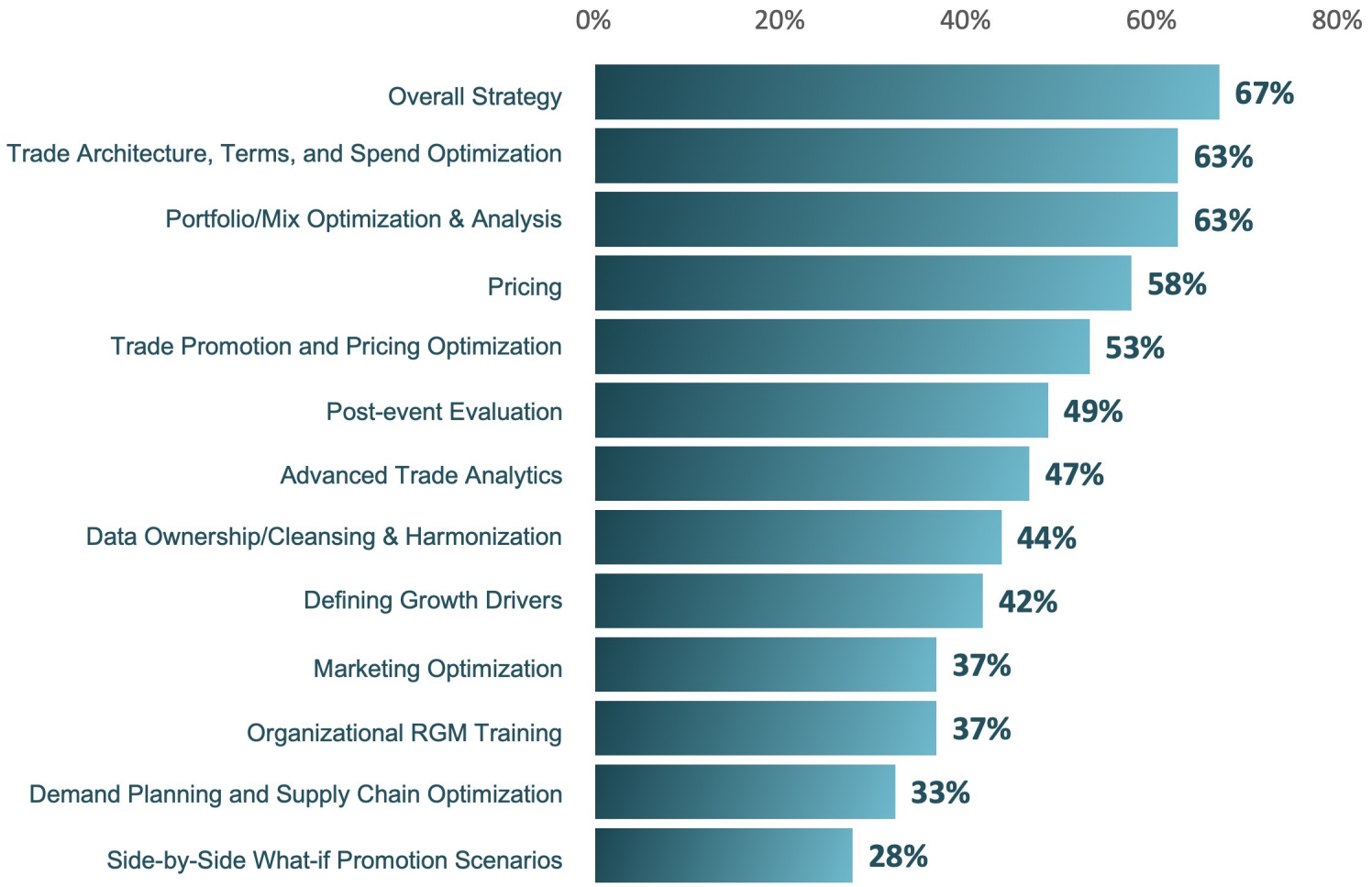
RGM Efficiency Hinges on Strong Strategic Alignment and Optimized Trade Architecture

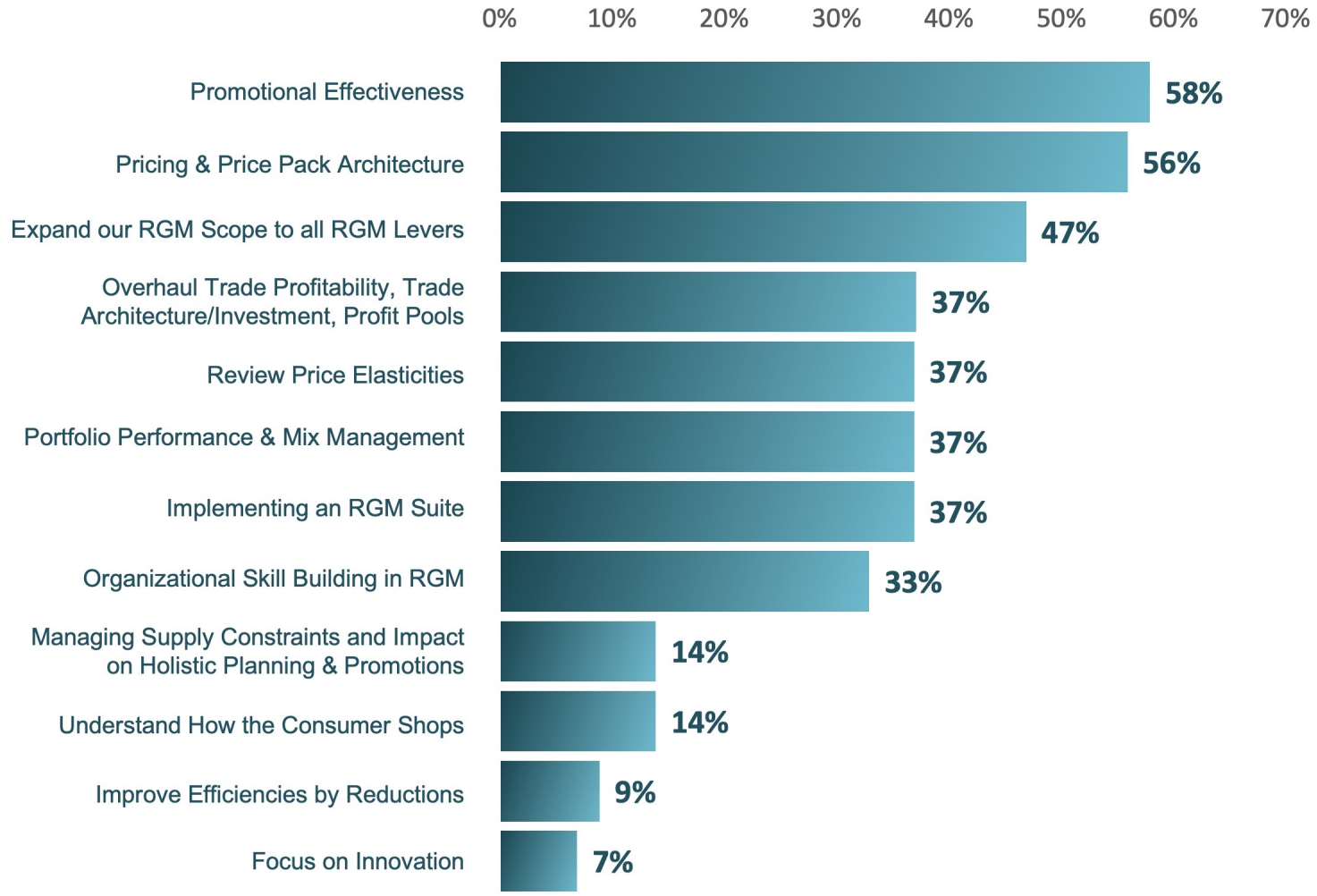
To move the needle on RGM efficiency and effectiveness, our company needs to improve…(Select all that apply)





Promotional Effectiveness and Pricing Lead RGM Agendas as CPGs Double Down on Profit and Productivity

What areas of RGM value creation will be your organization's largest focus during this next year? (Select all near-term priorities that apply)



Manufacturers are sharpening their focus on promotional effectiveness **(58%)** and price pack architecture **(56%),** which are two of the most direct levers for near-term profit recovery.

Investments are shifting toward smarter, ROI-driven promotions and disciplined pricing structures that protect value while maintaining competitiveness.

At the same time, expanding RGM into broader levers such as trade profitability, mix management, and elasticity reviews (each **37%**) highlights an industry push toward integrated, data-informed decision-making.

As inflation pressures ease but consumers remain price-sensitive, the next phase of RGM success will come from improving trade discipline, strengthening retailer collaboration, and eliminating inefficiency in promotion and investment spend.

CPGs that connect these tactical advances with broader strategic clarity will drive sustainable, resilient margin growth and build stronger, trust-based retailer partnerships.

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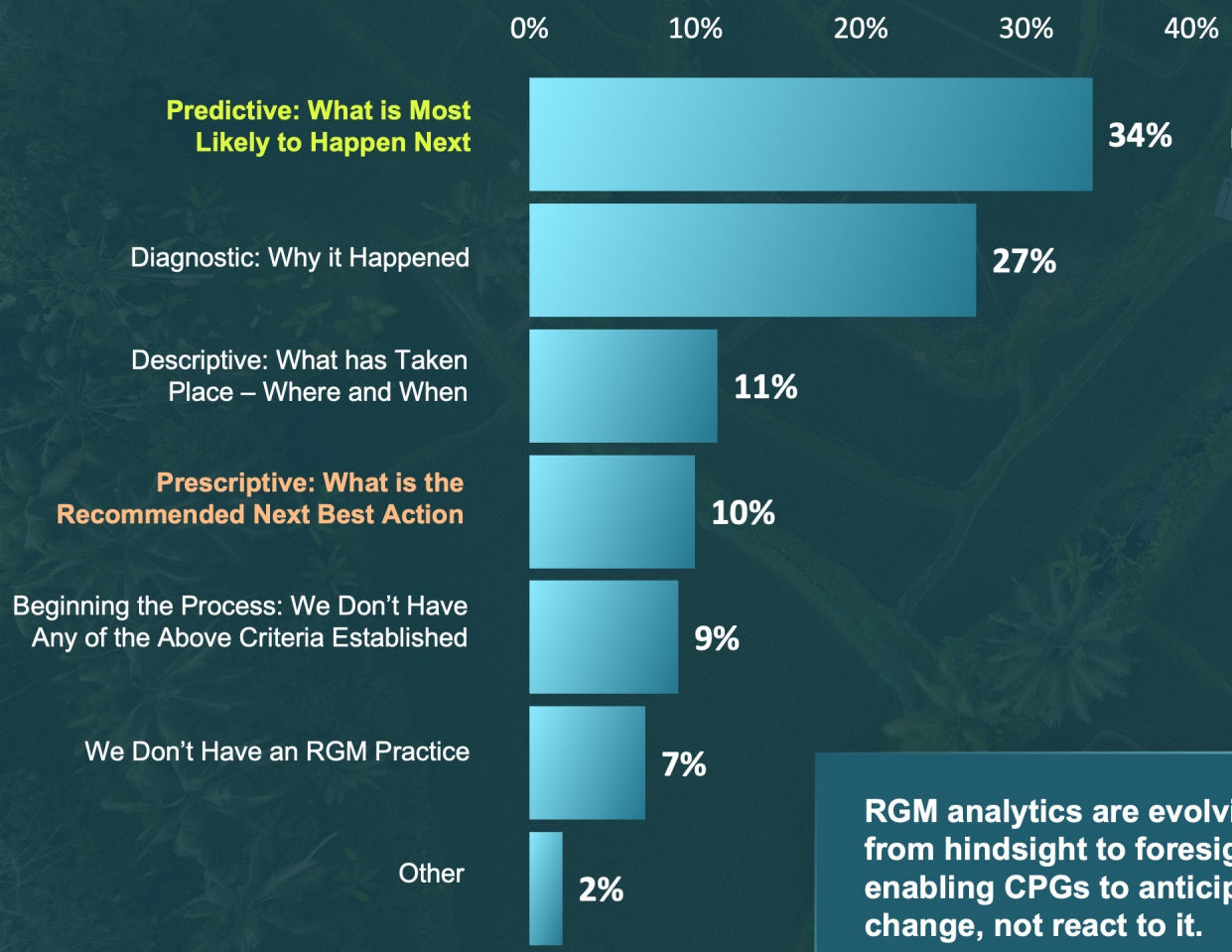
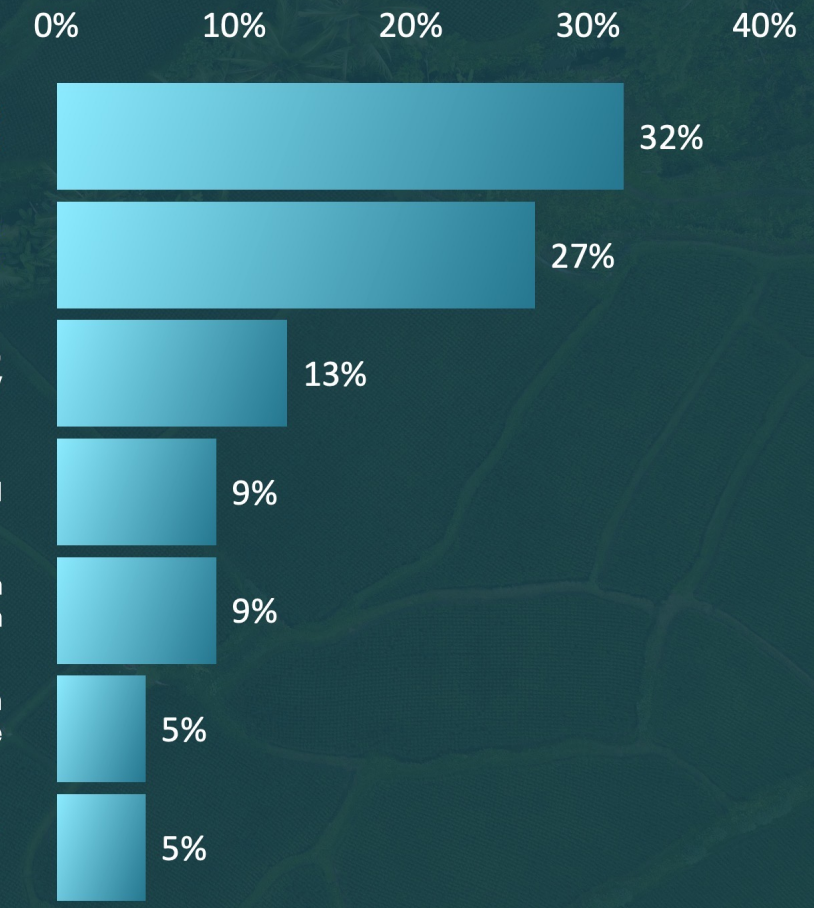
CPGs Are Elevating RGM Analytics to Drive Smarter, Faster Decisions

What is the maturity of your current RGM analytics practice:



RGM analytics are evolving from hindsight to foresight – enabling CPGs to anticipate change, not react to it.

What level of RGM analytics maturity is your goal for 2026?



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Advancing Analytics to Understand the Next Best Action



Anticipatory Analytics with Advanced Modeling/AI (Non-generative AI with Human-like Reasoning)

Prescriptive Analytics

Predictive Analytics

Descriptive User Generated Insights

Diagnostic Business Intelligence & Reporting

Cleansed, Harmonized & Staged Data

Consumer Behavior & Market Shifts Trigger Anticipatory System Recommendations & Autonomous System-Driven Decision-Making – Always On War Gaming- Past & Future Performance)

Predictive Engine Simulates and User Interprets Data and Prescribes Recommended Next Best Action-Past & Future Performance

User Uncovers What Is Most Likely To Happen Next- Past Performance

User Uncovers Trends and Casual Factors (Why) - Past Performance

User Analyzes Data to Determine What Has Taken Place – Past Performance

Foundational

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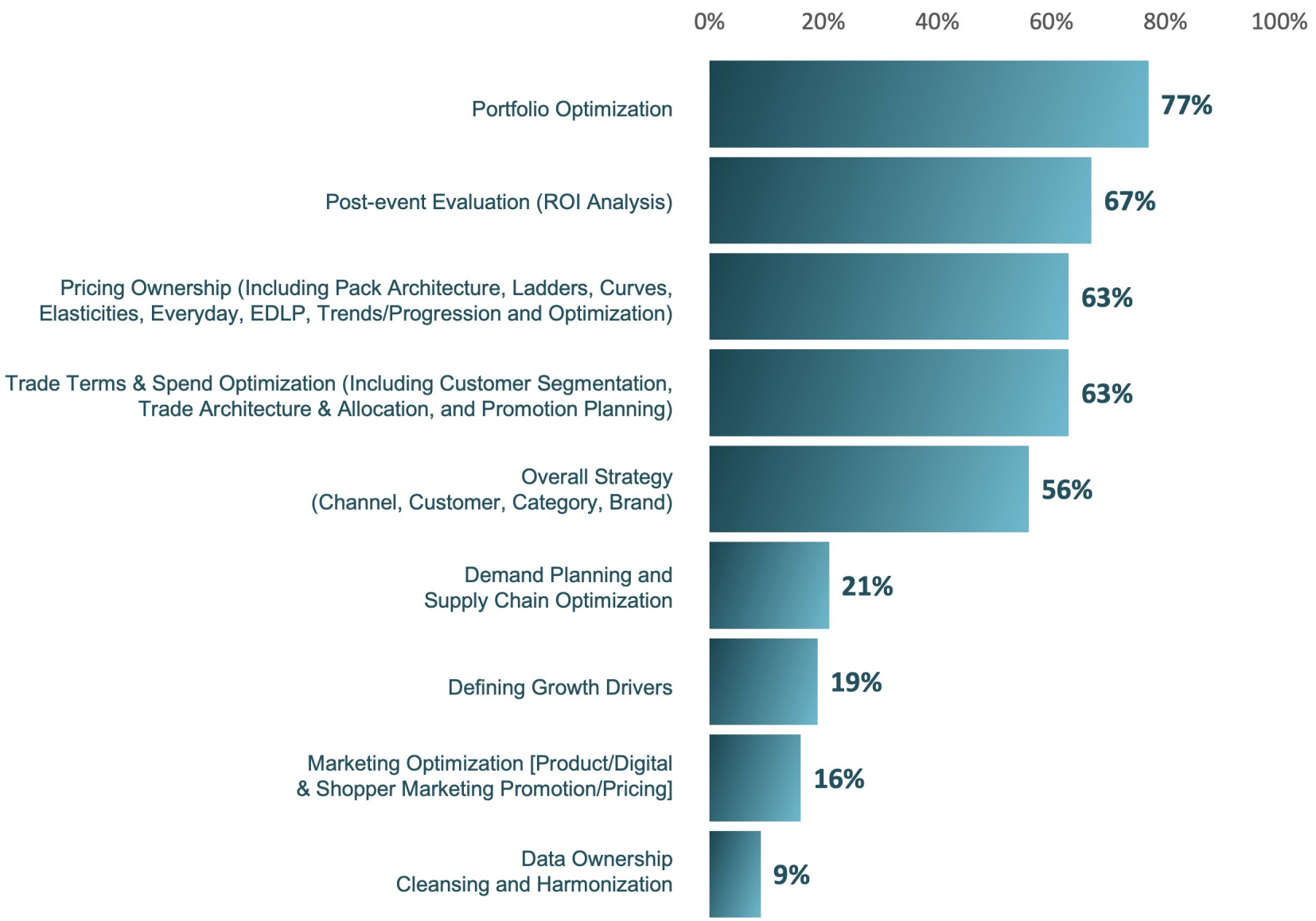
Where RGM Leaders See the Greatest P&L Upside





Leaders prioritizing portfolio, pricing, and trade optimization are capturing outsized margin growth.

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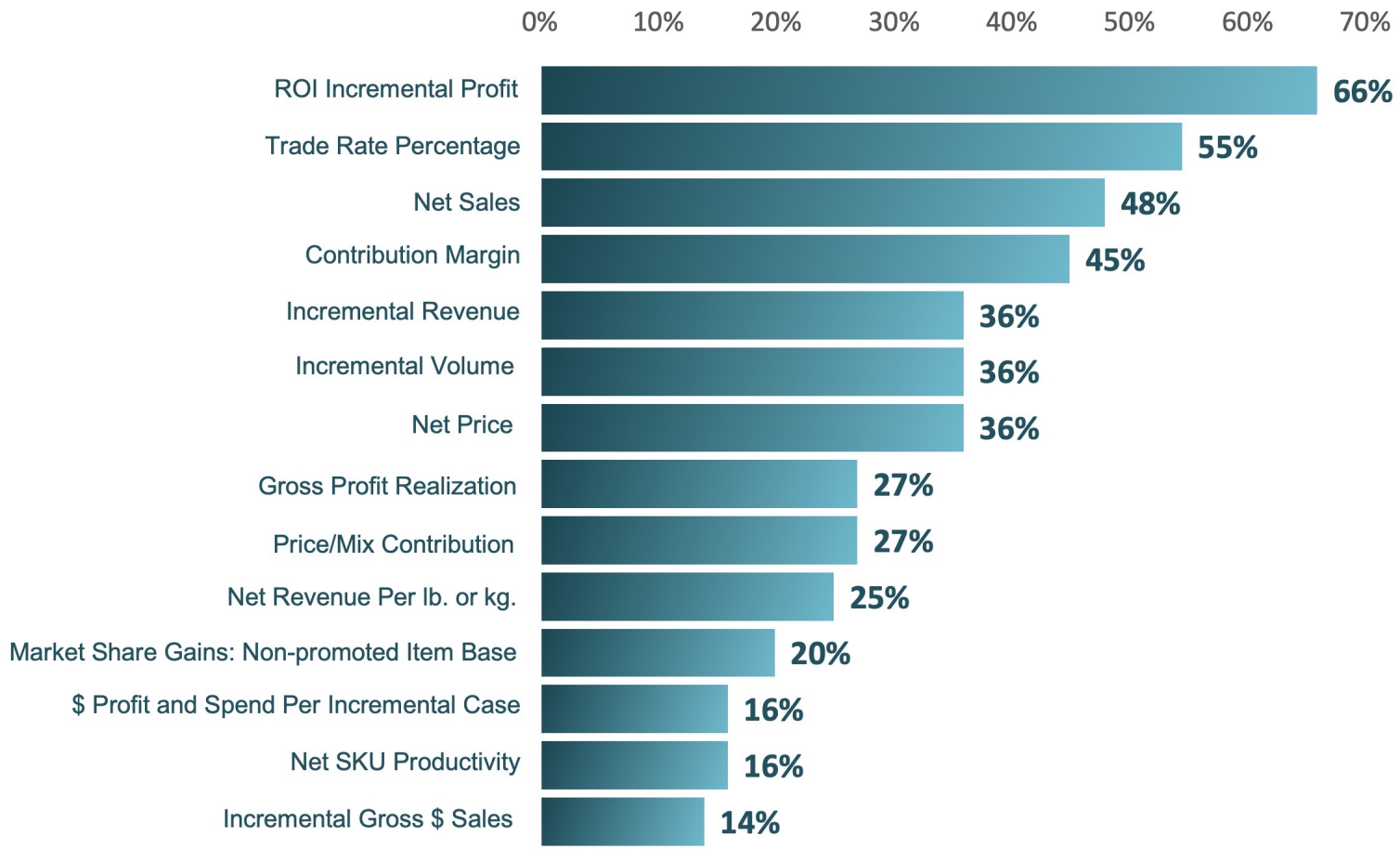
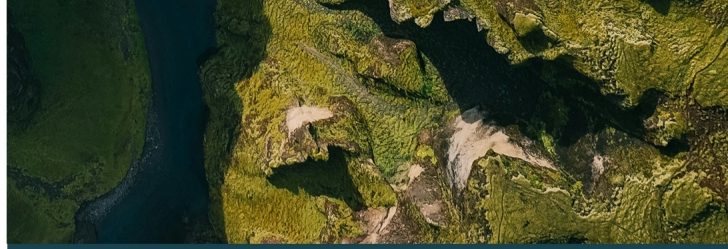
Top RGM KPIs Used to Measure Business Performance

RGM teams are elevating KPI discipline – focusing on profitable growth, not just topline expansion.

What are the top RGM Key Performance Indicators (KPIs) your team utilizes?





Effective KPI management is essential to driving profitable and sustainable RGM performance.

The surge in the adoption of KPIs for profit, mix, and net sales reflects a shift toward outcome-based accountability.

Aligning KPIs to strategy accelerates performance, sharpens decision-making, and reinforces growth discipline throughout the organization.

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70% of Companies Rely on RGM to Own Post-Event ROI Analysis



Primary Other Responses:

- Commercial -Finance &/or Trade Finance
- Controller

Leadership Action:

Empower RGM–Sales partnerships to jointly own post-event ROI and turn insights into action.

Broaden RGM accountability beyond core revenue teams to drive consistent, value-based decisions.

Equip sales teams with ROI analysis and negotiation capabilities for retailer engagement.

Standardize ROI processes across markets for consistent measurement and governance.

Invest in analytics tools to close remaining ROI capability gaps and ensure full performance visibility.

Your organization completes post-event ROI analysis. Who performs this work?

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Centralizing Promotion & Pricing Under RGM Delivers Faster Insights & More Profitable Decisions

RGM teams are increasingly central to scenario planning and optimization, using automated platforms to model potential outcomes and enhance trade and pricing decisions. As organizations adopt these tools, cross-functional teams gain faster insights, stronger collaboration, and improved go-to-market execution.

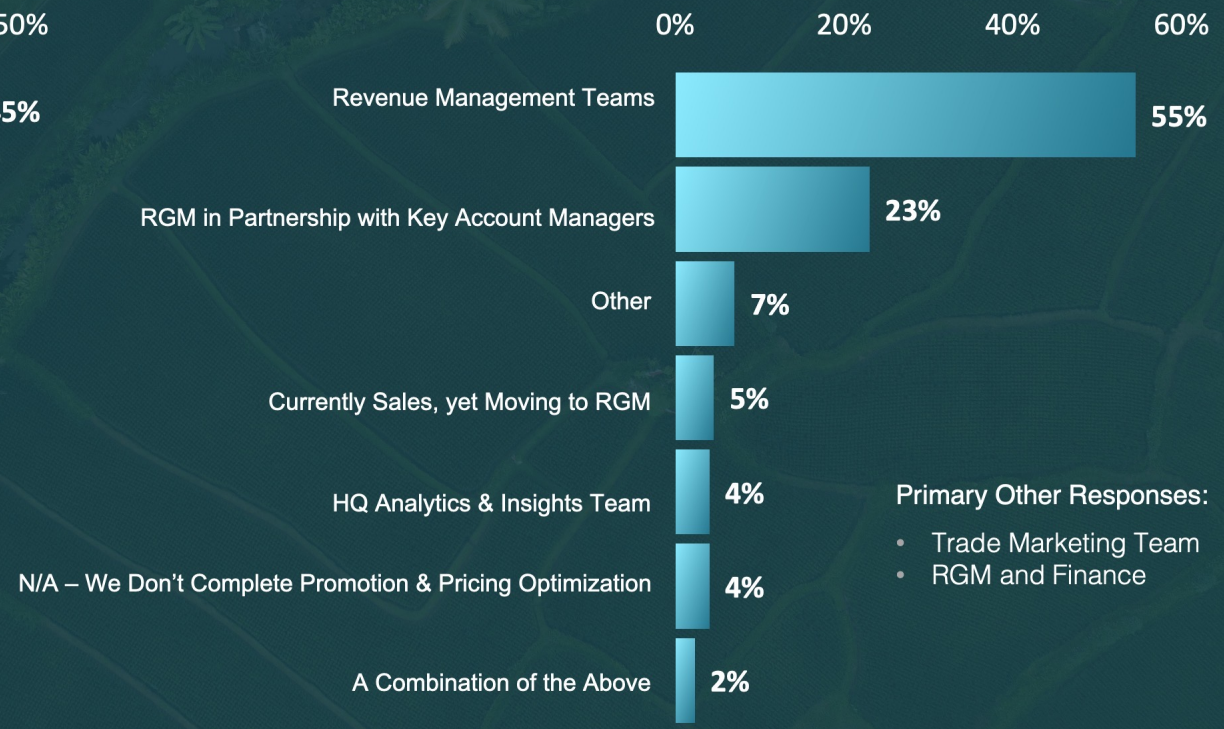
Your planning capabilities include “what-if” promotion scenario planning. Who performs this work?

(Please pick the primary team that executes the work)



Your organization completes advanced trade promotion and pricing optimization. Who performs this work?

(Please pick the primary team that executes the work)



Primary Other Responses:

- Trade Marketing Team
- RGM and Finance

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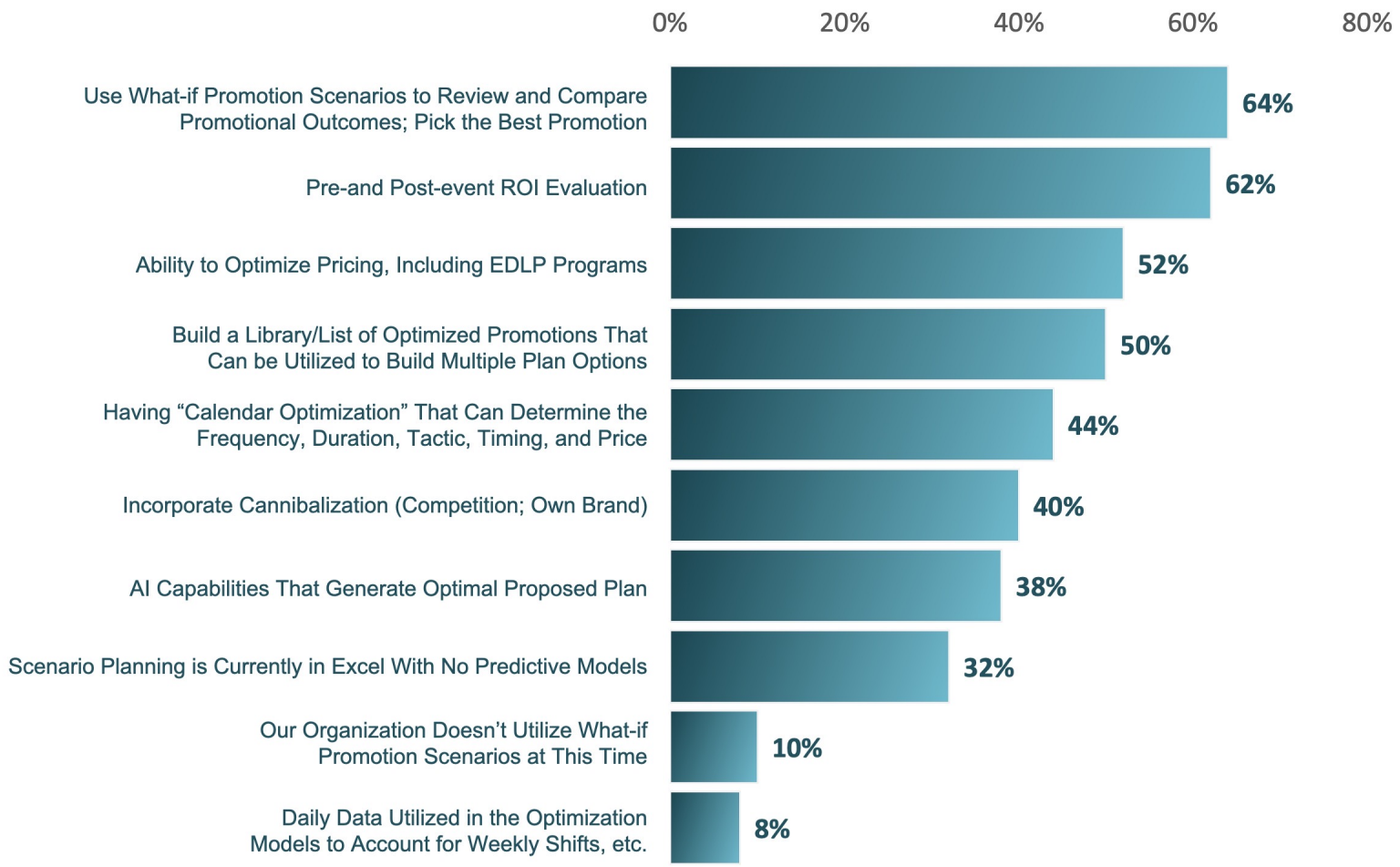
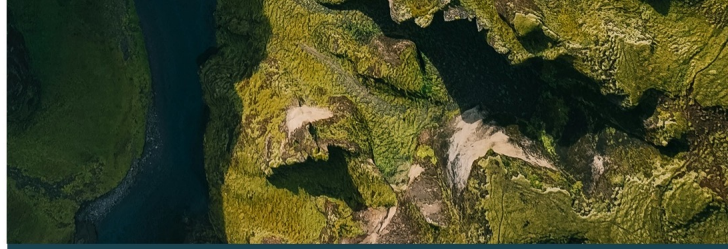
From Static Planning to Predictive Precision: RGM Teams Leverage What-If Modeling & ROI Analysis to Maximize Returns

When using what-if promotion scenarios with predictive models, which of these are important to you?





TPM has evolved from transactional to strategic: Modern TPMx platforms integrate planning, what-if scenario modeling, and post-event ROI analysis, driving higher adoption and materially better decisions.

Optimization is the clear priority: Promotion Optimization Institute data shows **64%** of companies prioritize what-if optimization, **62%** require post-event ROI measurement, and **44%** want full promotional calendar optimization.

Pricing and optimized promotion library: **52%** of companies prioritize pricing optimization (including EDLP), and **50%** want reusable libraries of optimized promotions to scale planning efficiency.

Why this matters:
Executives who invest in integrated TPMx and simulation capabilities move from hindsight reporting to forward-looking, ROI-driven commercial decisions—unlocking faster planning, better pricing discipline, and more profitable growth.

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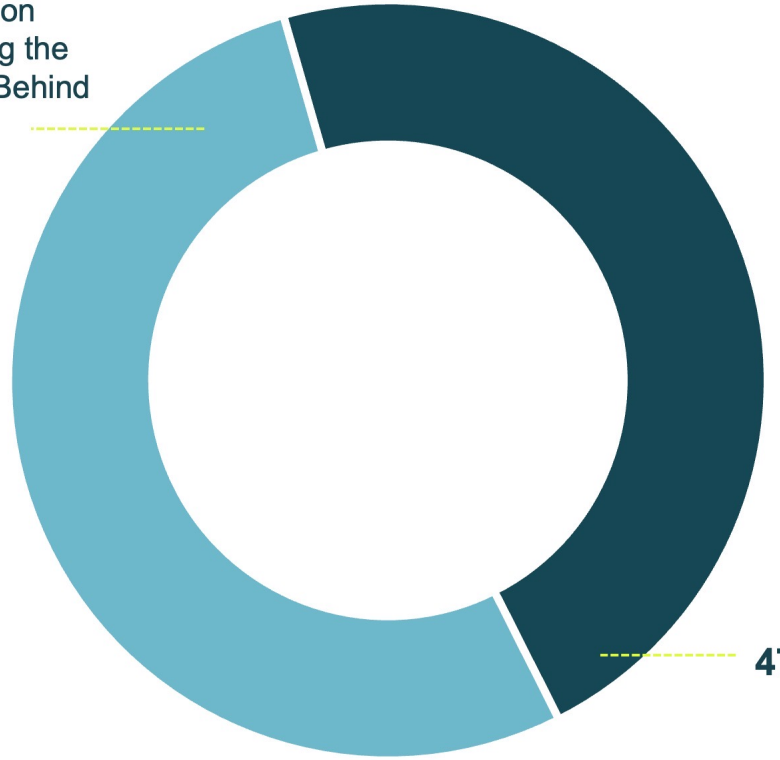
Sales Enablement Is a Key Driver of the Transition to ROI-Focused Promotion Planning

Has your organization successfully developed and implemented new promotional strategies for retail sales?



53% Yes, Most Retailers are Open to Trying New Promotion Tactics When We Bring the Right Data and Story Behind the Recommendation

47% No, My Teams Re-plan Previous Years' Events to Anniversary Past Event Performance

Legacy planning persists:
47% of companies still rely on anniversary-based plans, repeating last year's playbooks despite significant changes in pricing and promotion dynamics.

Retailers are open to change:
53% report retailers will test new promotion tactics when supported by strong data and a compelling story, creating an opening to shift spend toward higher promo ROI.

Sales adoption is the bottleneck:
Despite access to testing and consumer response data, sales teams often resist new approaches due to perceived risk.

Capability unlocks confidence:
Training in negotiation, RGM, ROI, and financial metrics equips sales teams to advocate for change credibly and commercially.

Momentum compounds:
Small, data-backed wins build confidence, accelerate adoption, and improve performance at scale.

Why this matters:
The constraint is no longer the retailer's willingness or analytics; it's now sales capability and change management. Organizations investing in these areas transition from repetitive planning to ROI-driven growth more rapidly.

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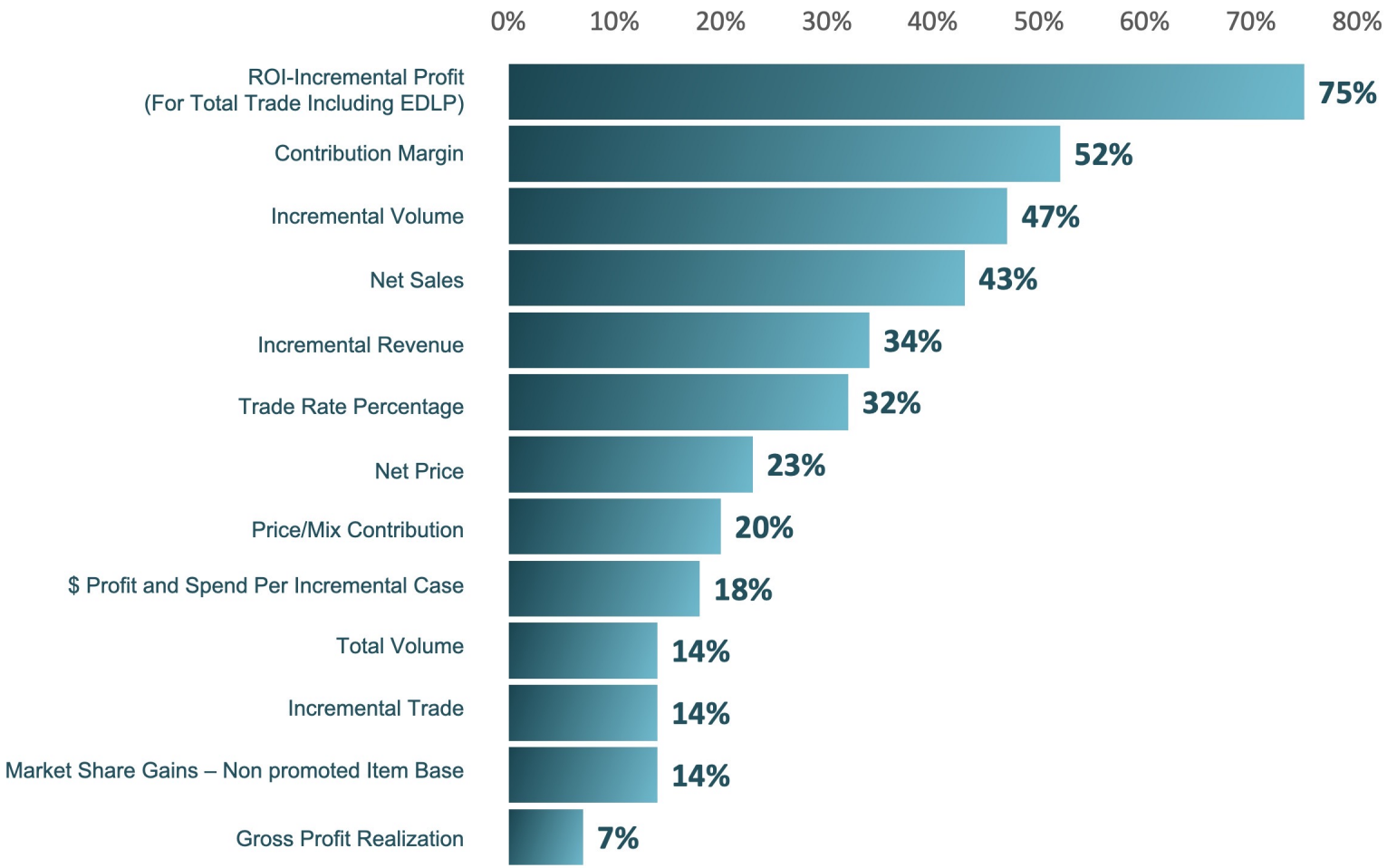
Promotion Success Is Primarily Measured by Profit and ROI, Not Growth Metrics

What are the most important KPIs your company uses to measure promotion success?



Leading organizations are expanding beyond ROI to link promotions to price, mix, and consumer outcome.

Most CPGs complete post-event ROI due to trade spend being a top P&L expense.

RGM KPIs largely mirror promotion success metrics for this reason.

Broader consumer and growth KPIs remain aspirational for many organizations.

78% of POI respondents found creating promotional plans, from budgeting to execution and settlement, highly burdensome.

Commercial teams greatly value their RGM partners' support in alleviating planning challenges.

While profit-based KPIs dominate, limited use of strategic and consumer metrics constrain holistic promotion optimization and enterprise planning effectiveness.

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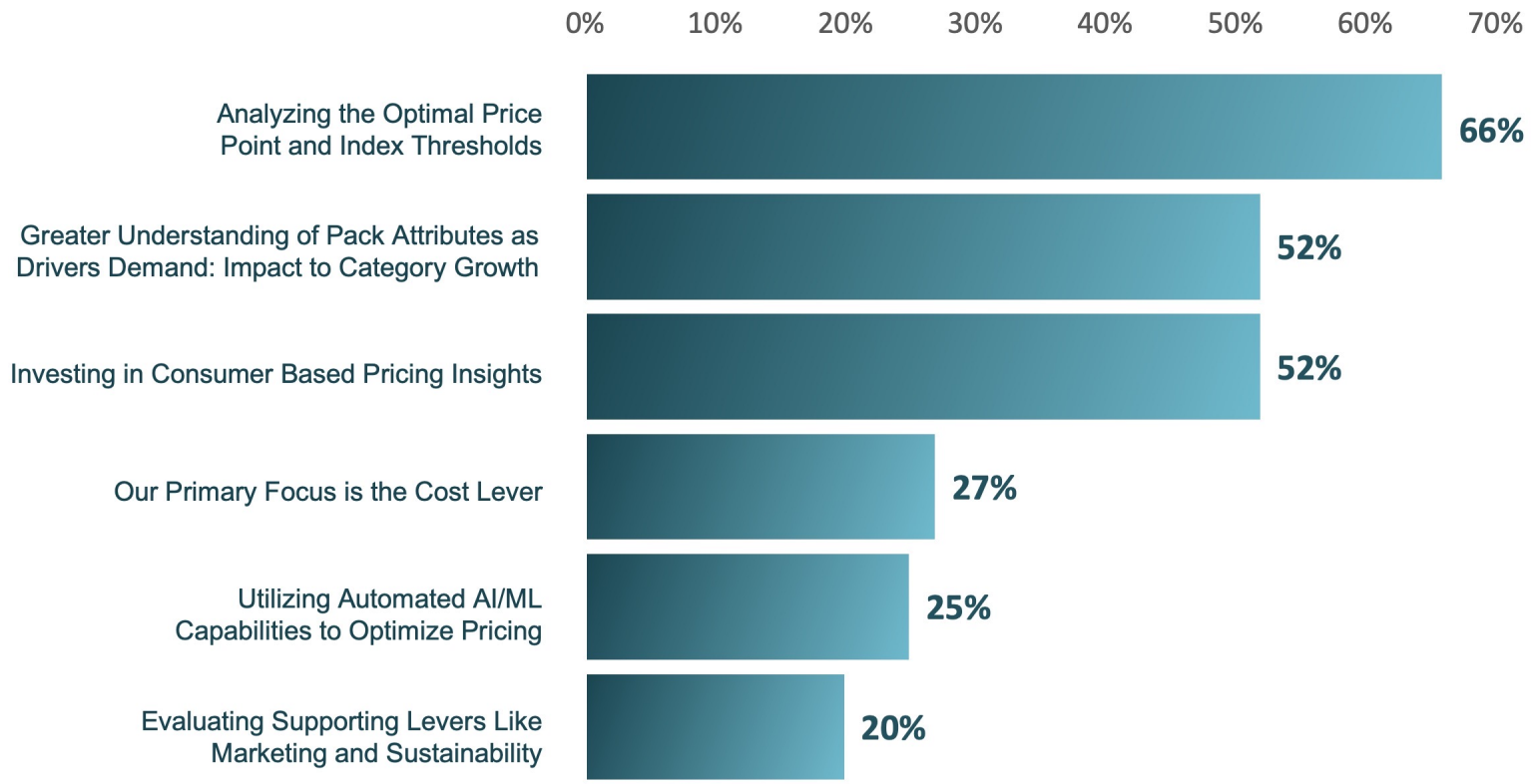
Pricing Evolution Is Focused on Price Architecture and Consumer Pricing Insights

How is your company evolving its pricing practices?





Foundational → Analytical → Automated

Companies are prioritizing price architecture and pack-level demand insights.

Consumer-based pricing is gaining traction, but adoption remains uneven.

Automation and AI-driven pricing offer opportunities to create a competitive advantage and enhance the scalability of insights across pricing, promotion, and mix for actionable decision-making.

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Fragmented ownership increases execution risk and slows response to market volatility.

Pricing decision-making is shifting from brand-led to analytically driven models.

RGM is increasingly central, but ownership is still split across functions.

Strong pricing outcomes require clear accountability and cross-functional governance.

Organizations with clearly define pricing, ownership, and RGM-led governance are better positioned to respond to cost volatility, protect margins, and execute pricing consistently across channels.

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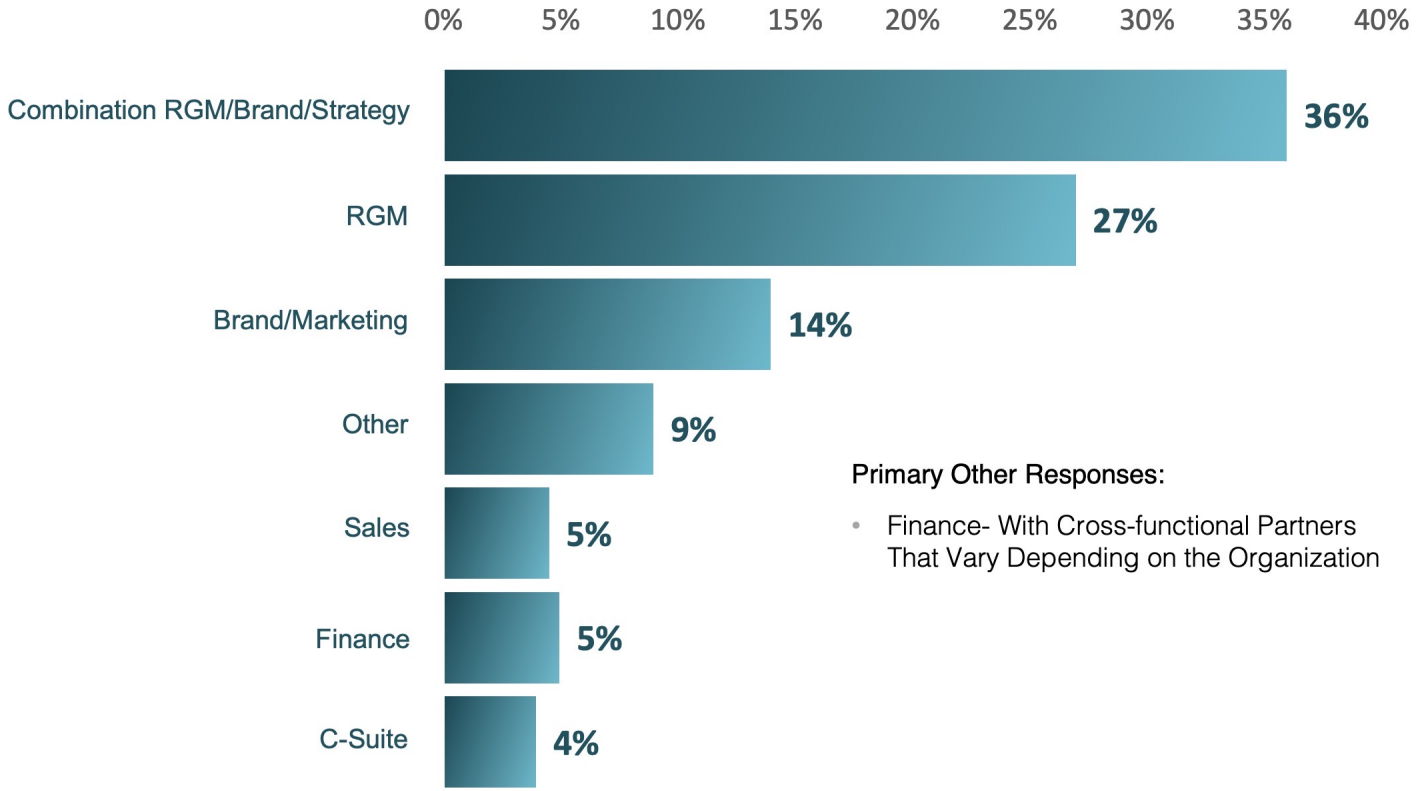
Pricing Management & Governance Is Shifting— Yet Clear Accountability Remains Inconsistent

What department in your organization is responsible for making strategic pricing decisions



Primary Other Responses:

- Finance- With Cross-functional Partners That Vary Depending on the Organization

Price Pack Architecture Ownership is Concentrated in RGM, but Governance Remains Fragmented

~ 50% operate with shared or non-RGM ownership

Clear ownership and decision rights are critical to effective Price Pack Architecture (PPA) execution.

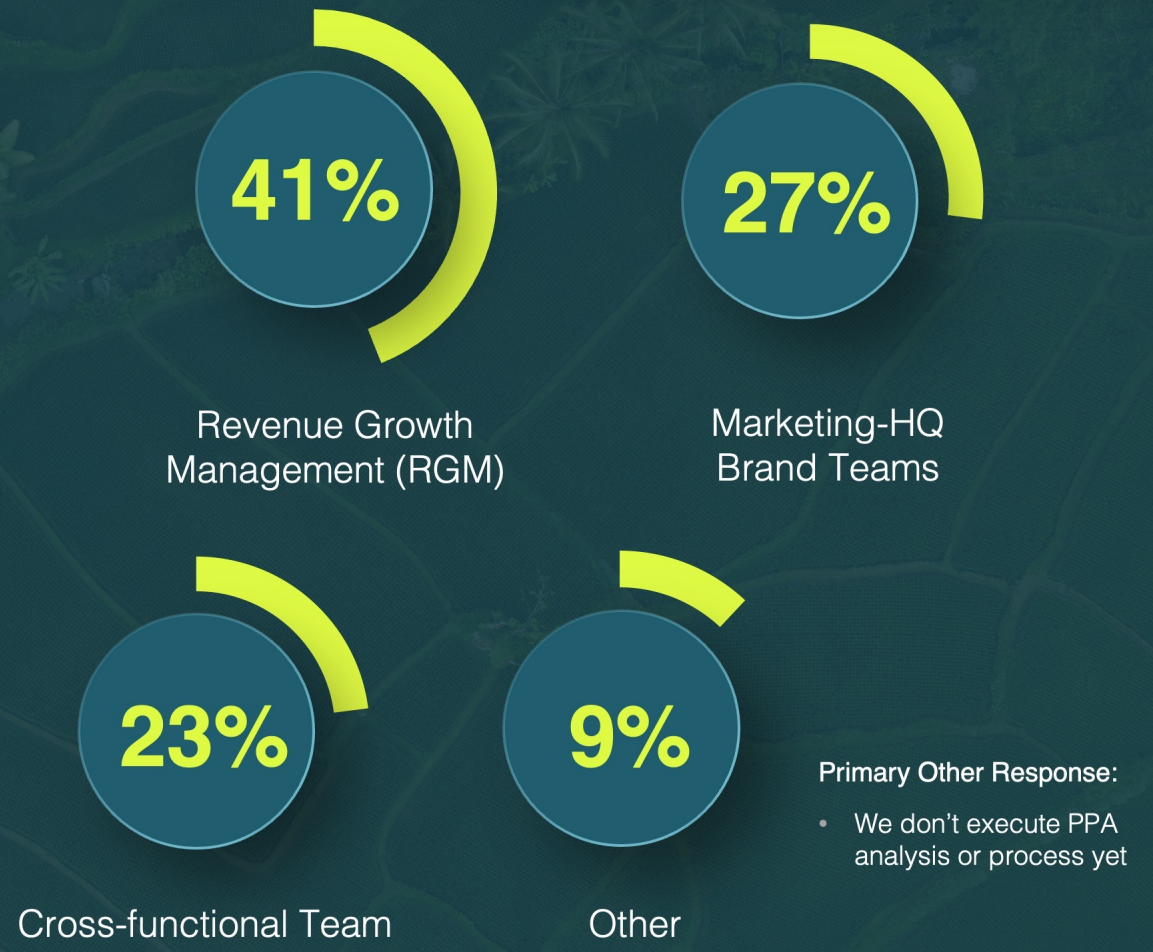
Price Pack Architecture is a strategic methodology that enables companies to offer consumers a diverse range of products tailored to their needs and preferences across various price points.

By gaining insights into consumer preferences and willingness to pay, companies can better align their product offerings with market demand.

PPA emphasizes optimizing product portfolios by evaluating price points, packaging sizes & configurations, and consumer desires.

This data-driven approach supports portfolio optimization, driving innovation (key pillars of RGM), and ultimately maximizing profit margins and ROI.

Organizations with RGM-led PPA governance are better positioned to align pricing, packaging, and portfolio decisions with consumer demand and profitability goals.



Primary Other Response:

- We don't execute PPA analysis or process yet

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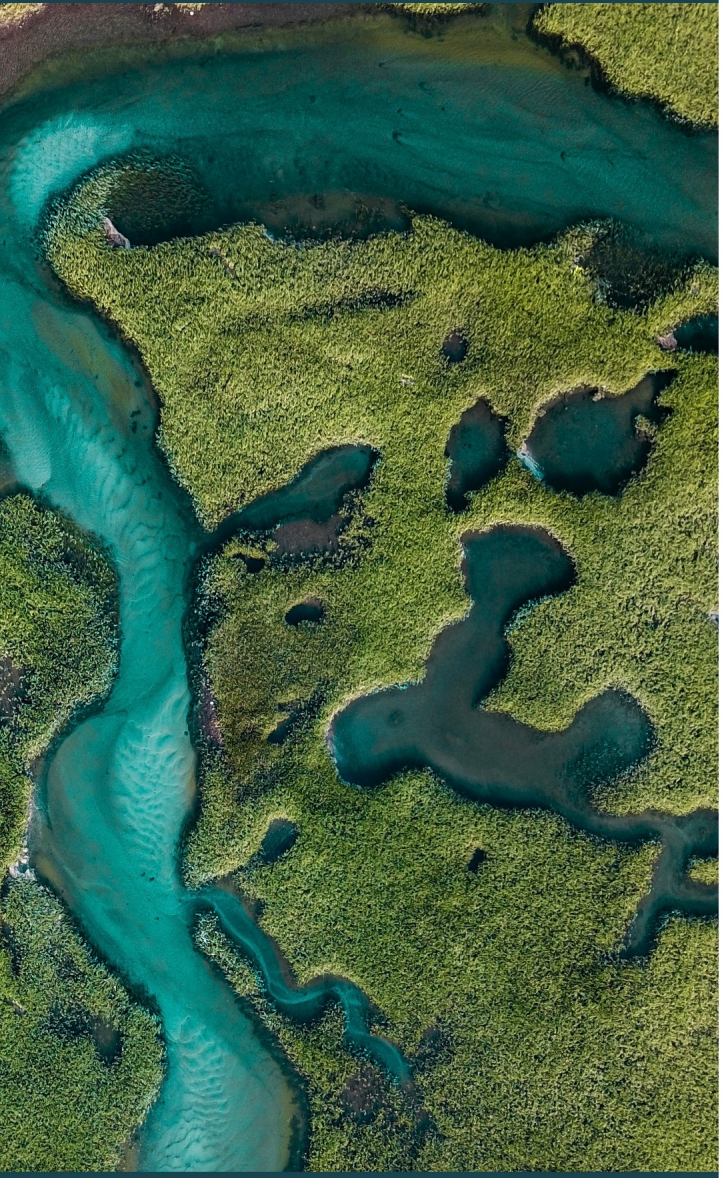
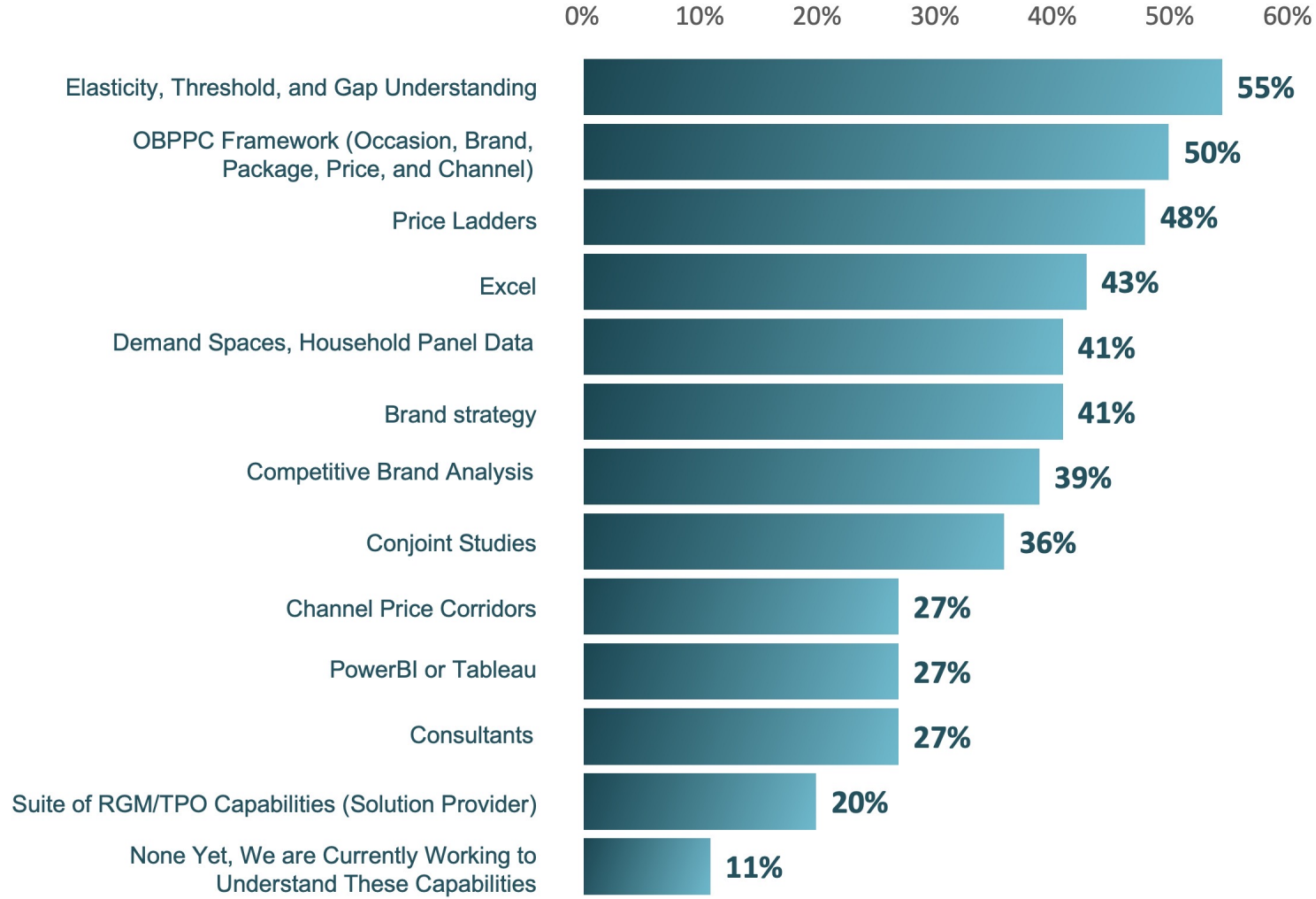


Elasticity, Price Ladders, and Frameworks Anchor PPA—Execution Still Relies Heavily on Manual Tools

What types of analyses/tools have you found most useful in supporting Price Pack Architecture (PPA) work at your organization?



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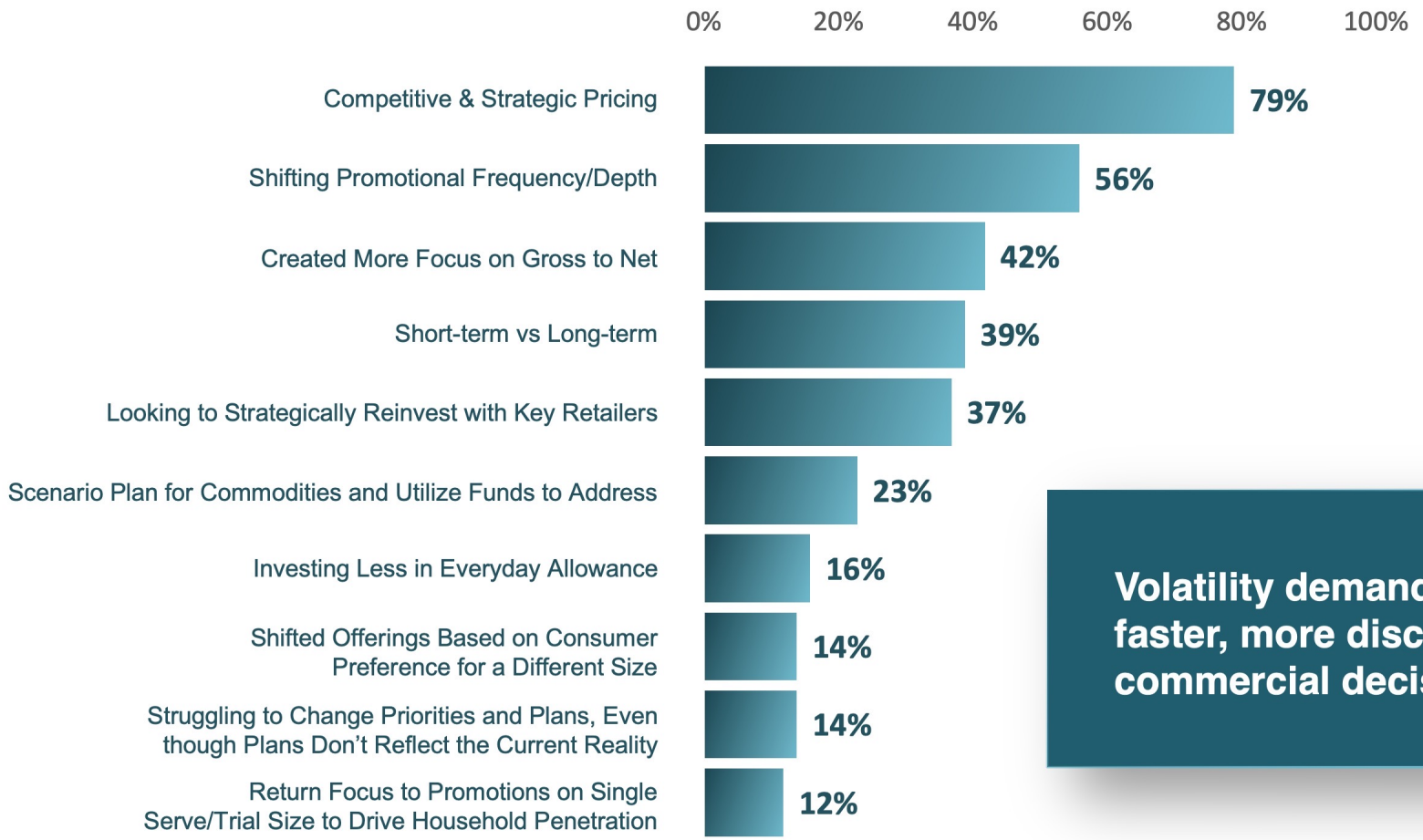
Market Volatility Is Driving a Rebalance of Pricing, Promotion, and Investment Decision

How have external factors, such as elevated pricing, decreased consumer buying power, political factors, and consumer buying/ shopping behavior, forced you to change your department priorities?



Volatility demands faster, more disciplined commercial decisions.



Elevated pricing and reduced buying power have intensified focus on pricing discipline.

Promotion strategies are being recalibrated to protect margins and ROI.

Fewer organizations are making structural portfolio changes in the near-term.

Leadership Action:

Near-term responses to volatility are tactical and pricing-led; sustained performance will require stronger scenario planning, integrated pricing, and promotion decision frameworks.

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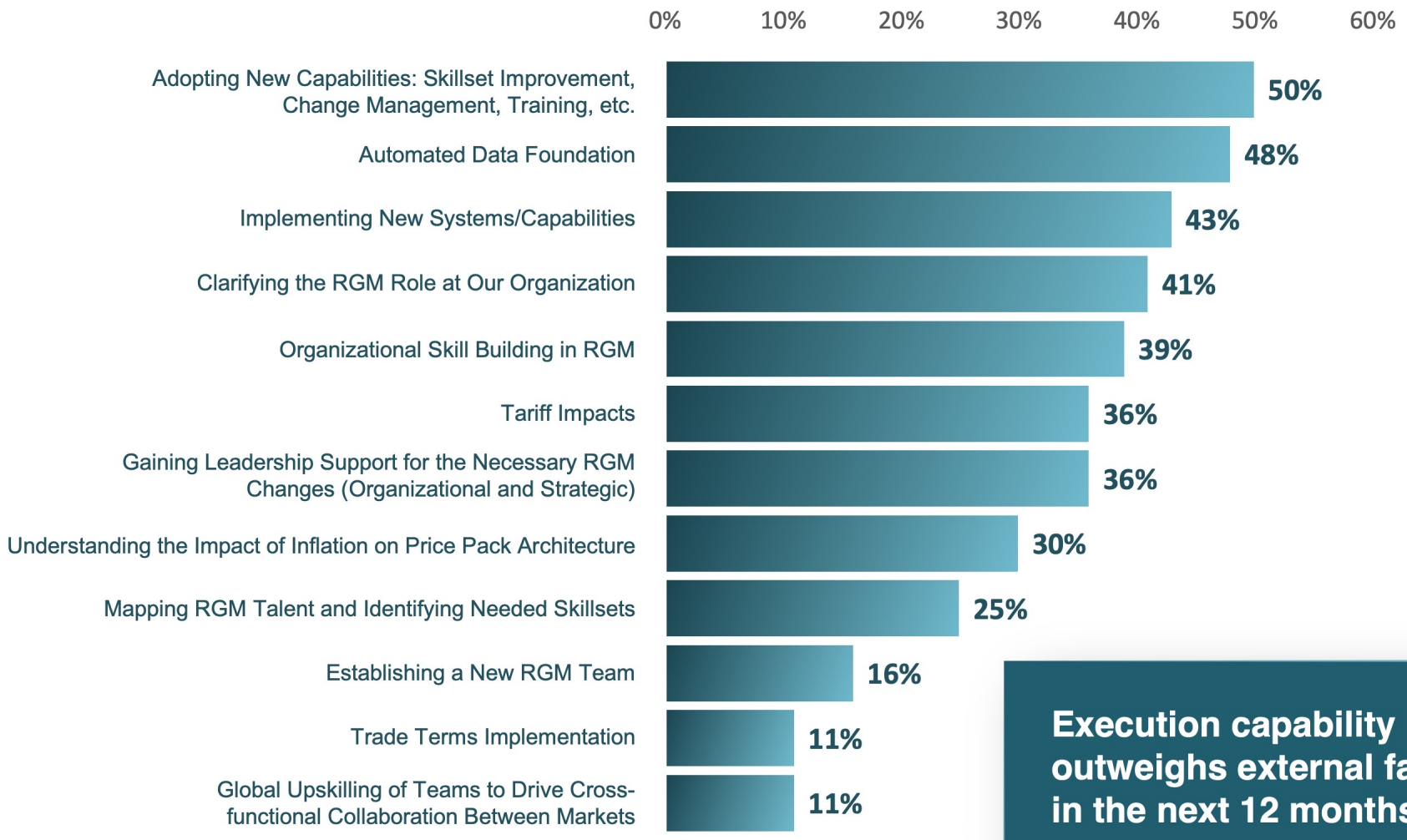
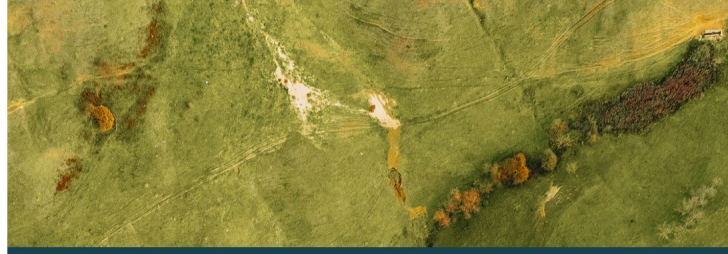
RGM Execution Is Being Limited by Skills, Enablement, and Organizational Clarity

What do you perceive to be the short-term (next 12 months) challenges for RGM teams?



Execution capability outweighs external factors in the next 12 months.



Peer benchmarking, sharing, and discussions of best practices can significantly enhance your company's Revenue Growth Management (RGM) journey and help in addressing challenges.

POI's RGM Share Group Members participate in share group meetings adjacent to POI Summits to create a supportive learning environment.

In each share group, manufacturers discuss their current projects and challenges while receiving feedback, advice, and best practices from their peers.

Contact Joanie Malin (jmalin@p-o-i.org) to learn more about POI's RGM Share Group.

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Most organizations know the RGM destination; few sequence the journey effectively.

Organizations that succeed in RGM adoption lead with a clear enterprise vision, prove value through early wins, and reposition RGM as a shared capability rather than a functional initiative.

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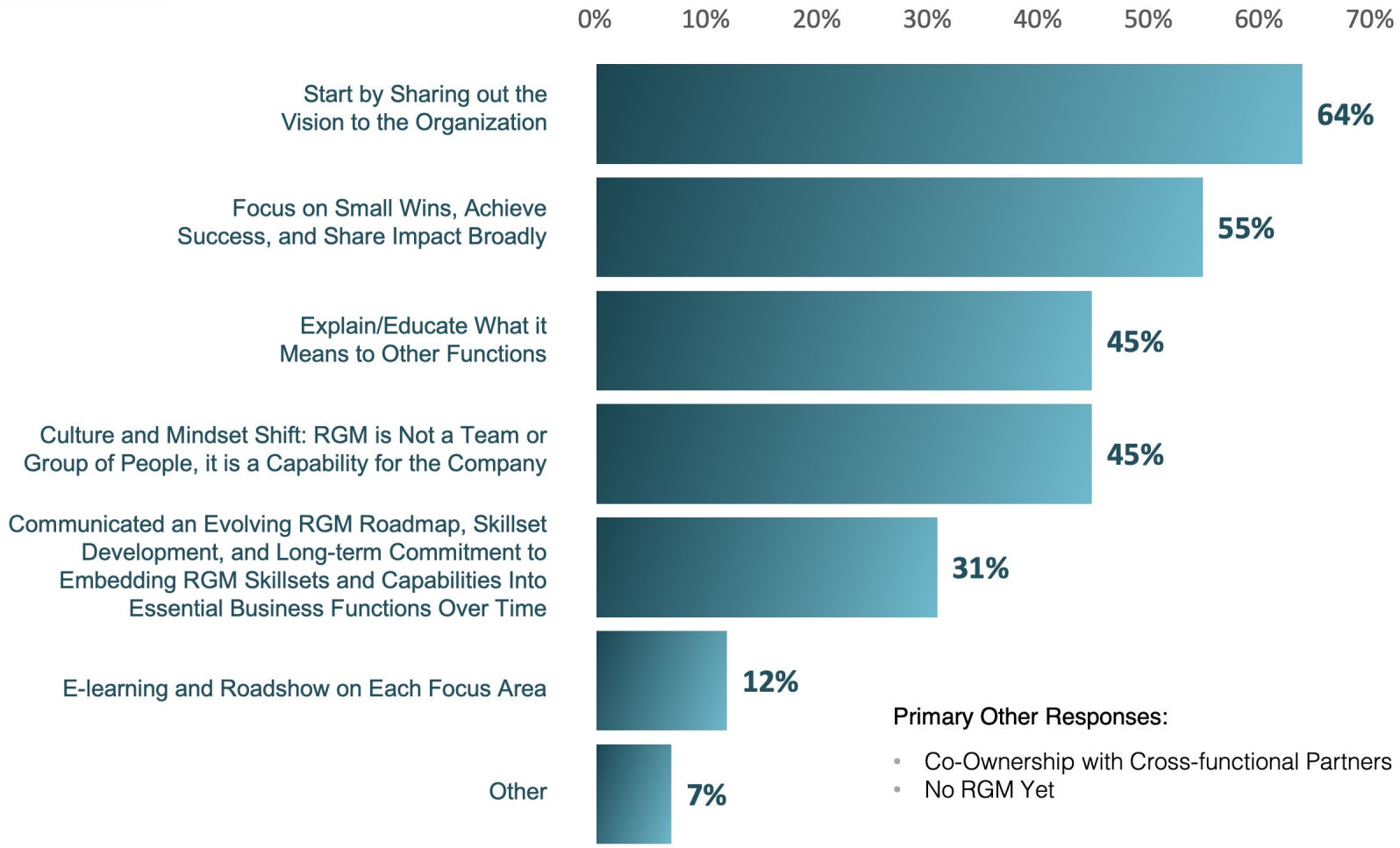
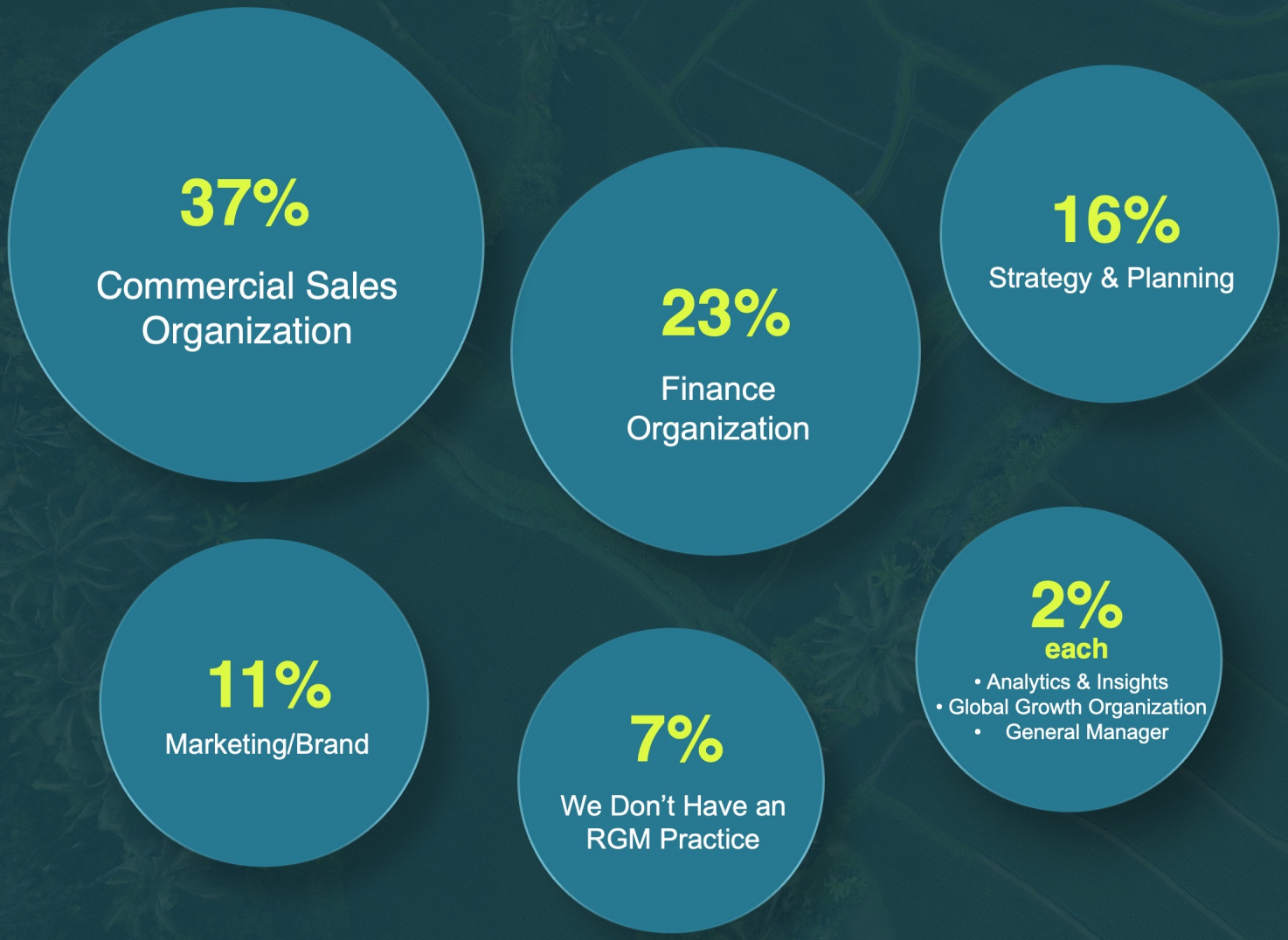
RGM Buy-In Is Earned Through Vision, Early Wins, and Shared Ownership

How did your organization overcome RGM challenges with cross-functional partner buy-in?



RGM Most Often Reports Into Sales, Reinforcing Commercial Alignment – but Governance Varies



~ 80% of RGM teams sit outside a central enterprise function.

Most RGM teams report into Commercial/Sales, reinforcing execution proximity.

A significant minority report into Finance or Strategy, emphasizing control and rigor.

Few organizations position RGM as a standalone enterprise capability.

Reporting lines signal intent—Sales-led models emphasize speed and execution, while Finance/Strategy-led models emphasize discipline.

Clear decision rights and cross-functional forums matter more than reporting alone.

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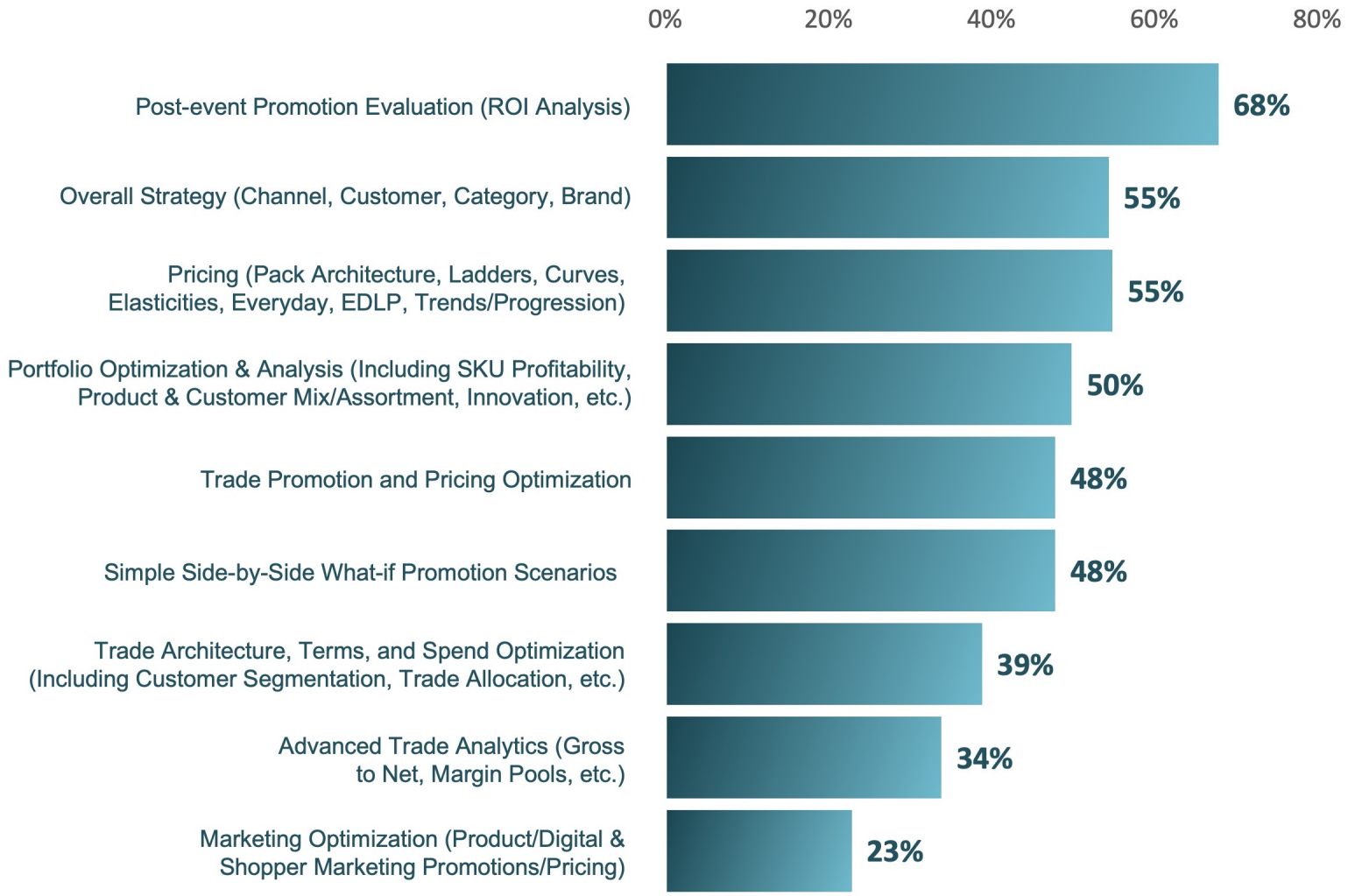
Foundational RGM Capabilities Are Largely In-House; Advanced Trade Analytics Lag

Which of the following capabilities do you complete with internal teams vs. external consultant/service?



POI research reveals that many organizations complete essential work with internal teams:

Most organizations now execute core RGM and pricing work internally.

Optimization and scenario modeling are split between internal teams and partners.

Advanced analytics and marketing optimization remain areas of external reliance.

POI observes a correlation between companies bringing RGM work in-house and the increase in available RGM suites that have entered the market over the last five years.

As RGM capabilities move in-house, investment must shift from external execution to internal enablement—data foundations, skills, and scalable platforms determine how far organizations can progress.

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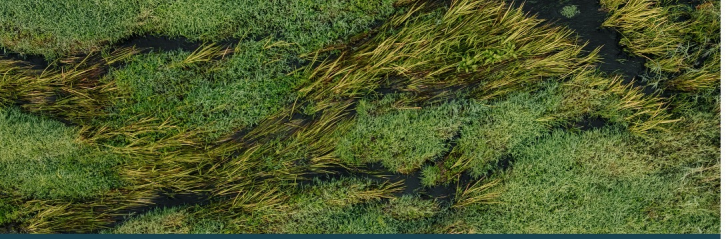

Whether you are initiating a new RGM practice or evolving an established organization, developing an RGM mindset and internal RGM bench strength and knowledge is essential.

POI sees internships as an excellent way to attract new talent from food marketing programs that teach modern RGM approaches.

By focusing on building RGM bench strength through rotational development programs, organizations can cultivate future senior leaders equipped with a strong RGM mindset, preparing them for greater leadership roles.

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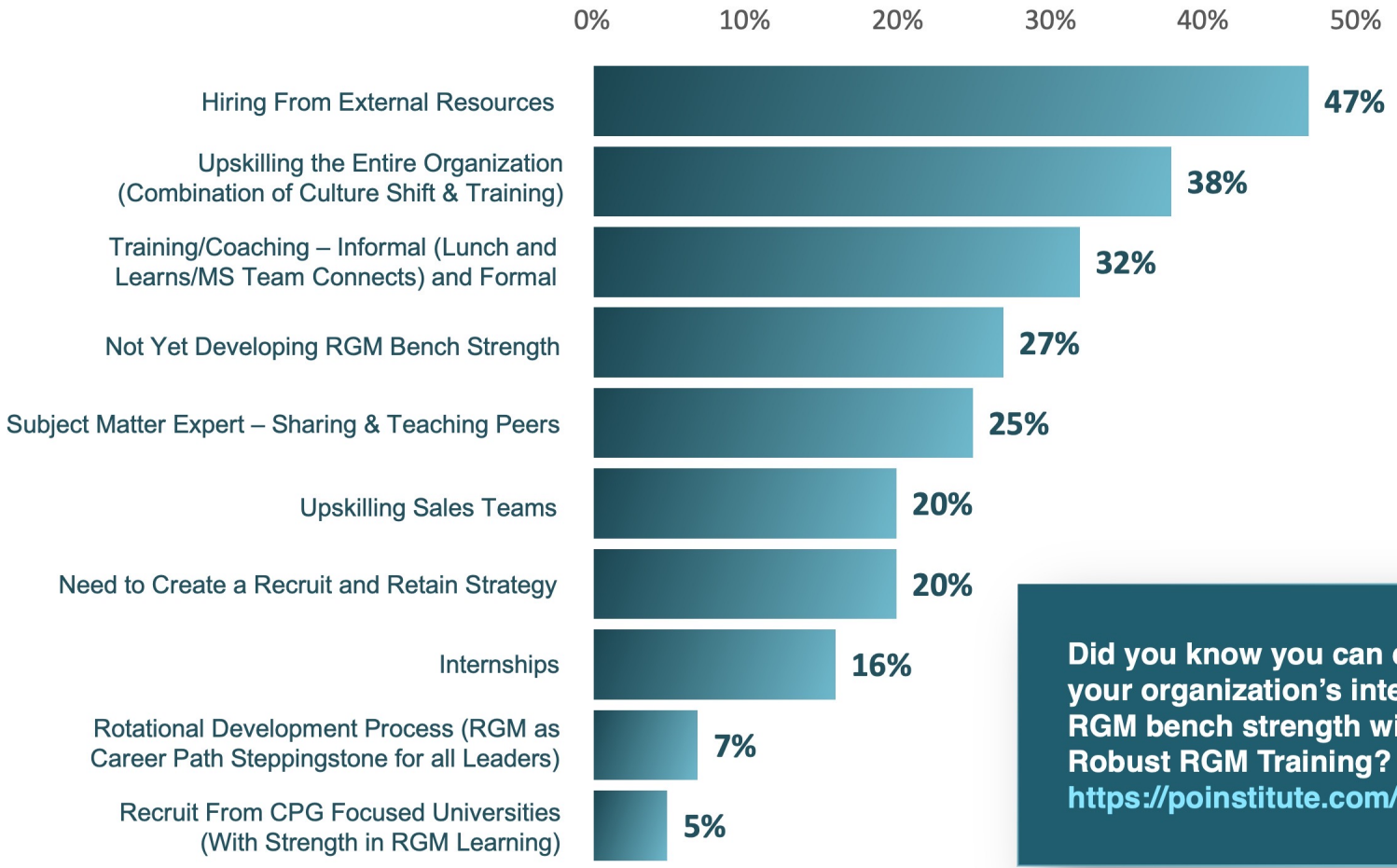
A Shift Occurred- CPG Organizations had a 20% Decrease in Upskilling their Organizations and Secured RGM Bench Strength From Outside Resources

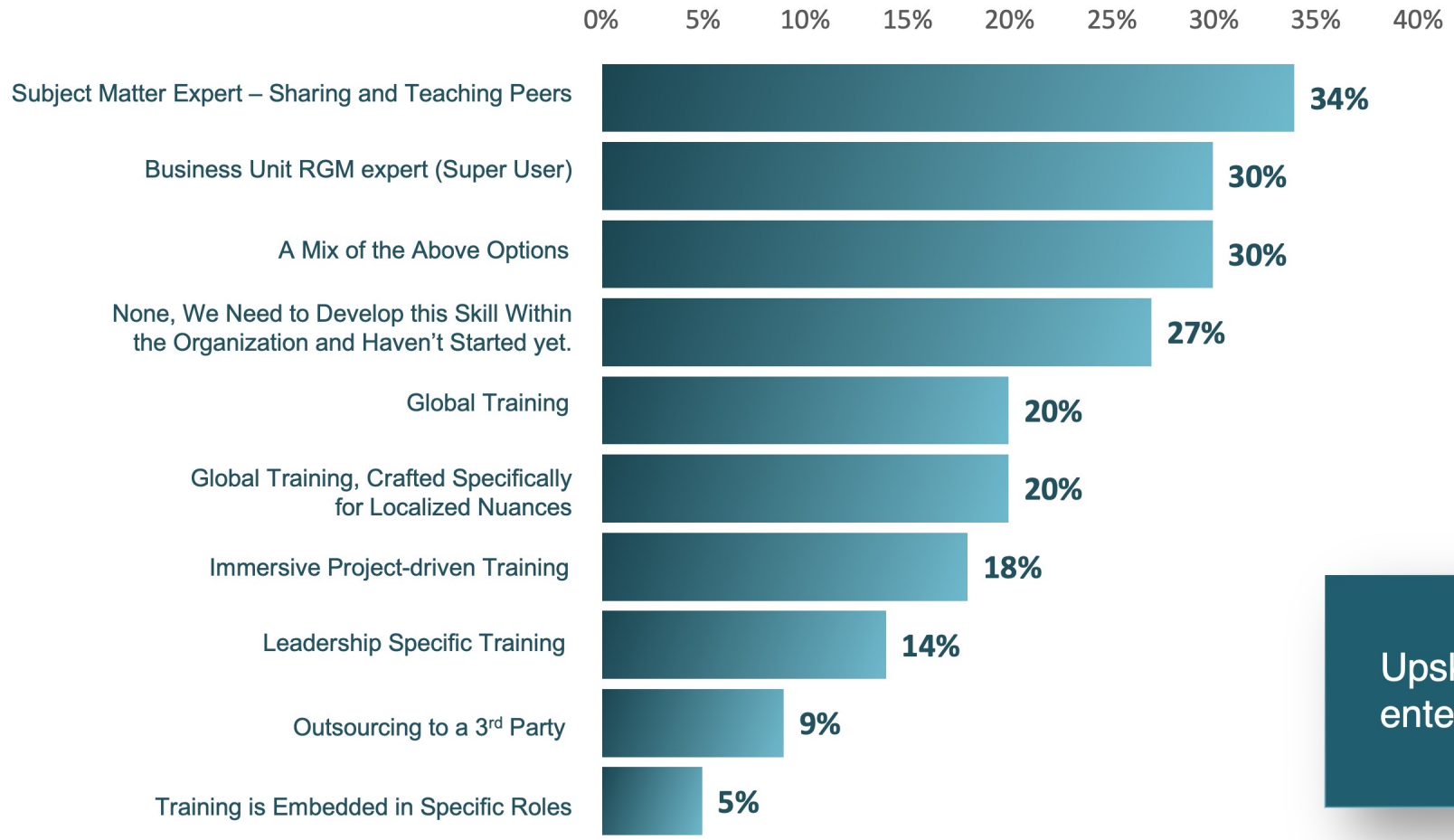
How are you developing internal RGM bench strength for your organization?

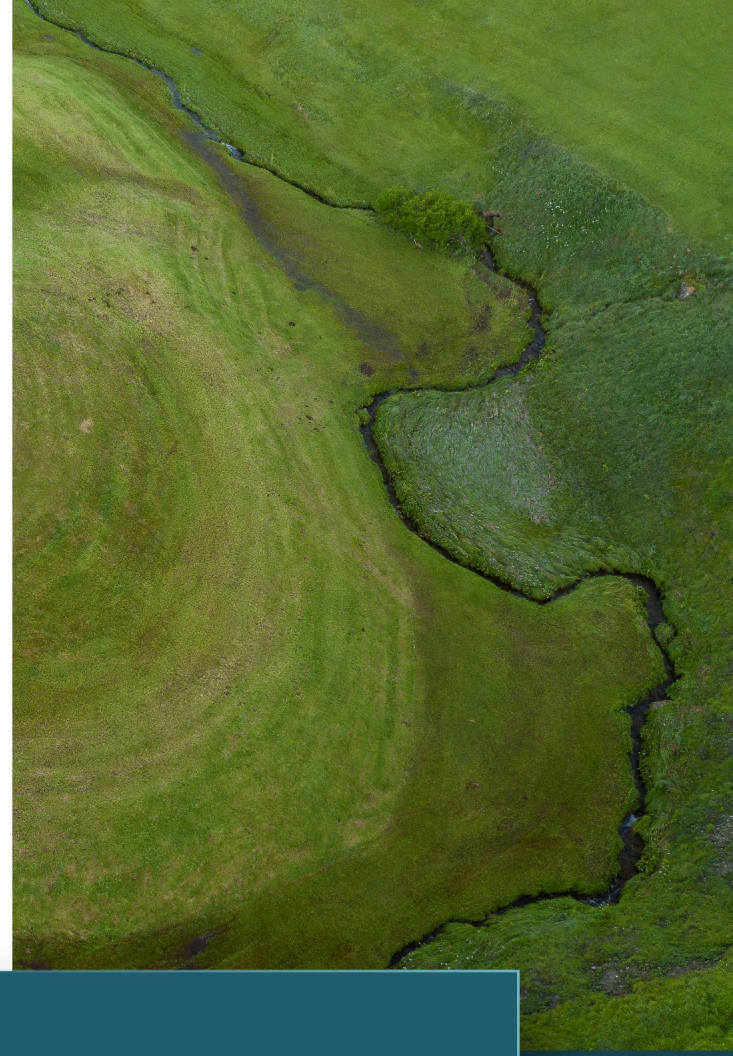


Did you know you can develop your organization's internal RGM bench strength with POI's Robust RGM Training?
https://poinstitute.com/training

RGM Capability Development Is Fragmented and Still Maturing

What is your RGM training approach to upskill the enterprise?





Upskilling the cross-functional enterprise is essential to success.

Note: Global training crafted for localized nuances has significantly increased year-over-year.

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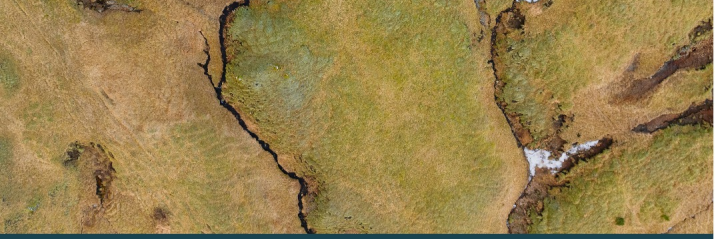

RGM training most often begins with revenue management and field sales (KAM) teams.

Today, leadership and enterprise roles are rarely first-wave priorities. Yet, for leaders to steer their organizations to profitable growth, leadership training is essential. Delaying leadership enablement risks inconsistent adoption, misalignment, and slower enterprise scale.

A material portion of organizations has yet to launch RGM training.

Leading organizations pair early field training with rapid leadership enablement to accelerate enterprise adoption.

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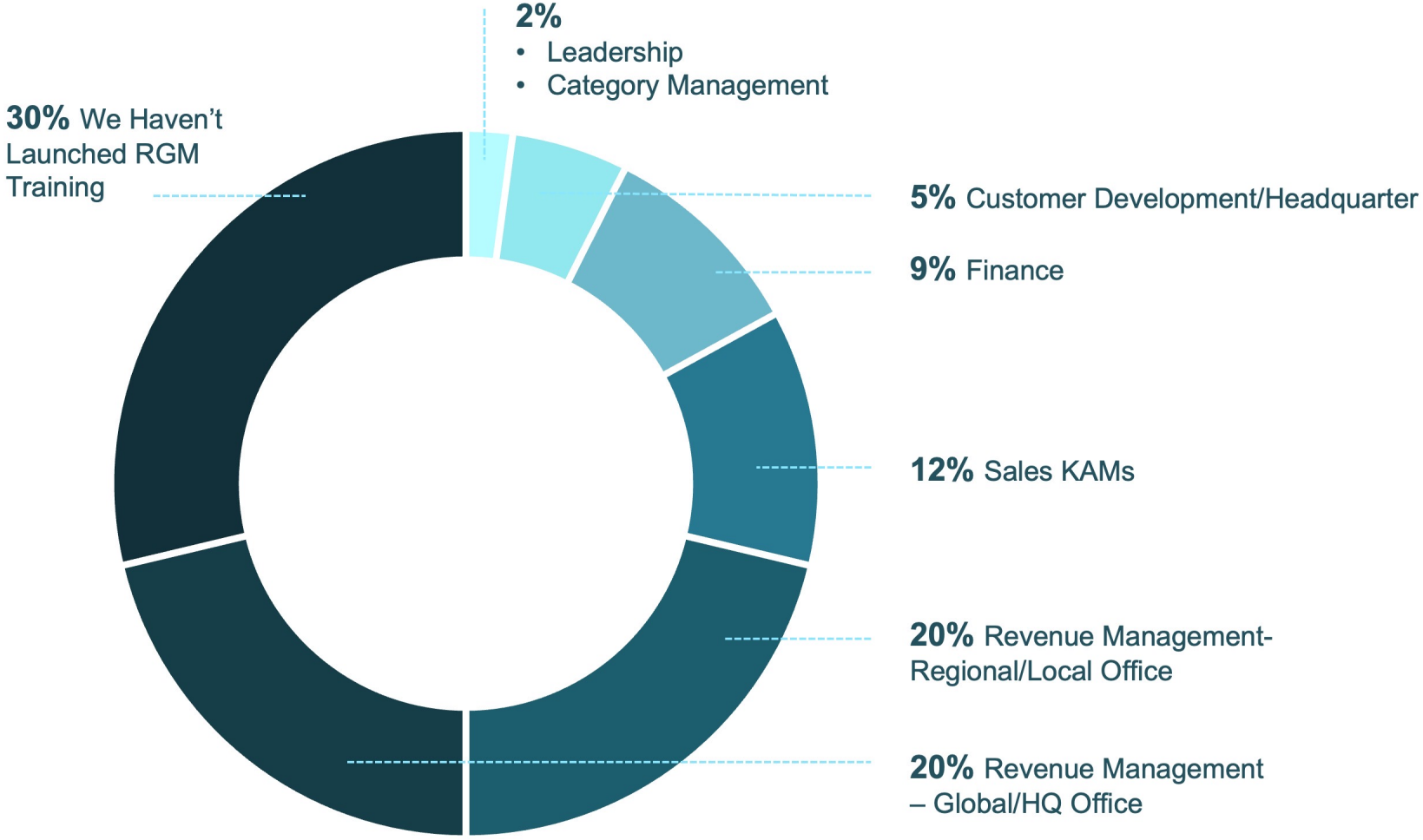
RGM Training Launches Where Commercial Impact Is Immediate

When you deployed RGM training, which roles were key priorities as you launched a new practice?

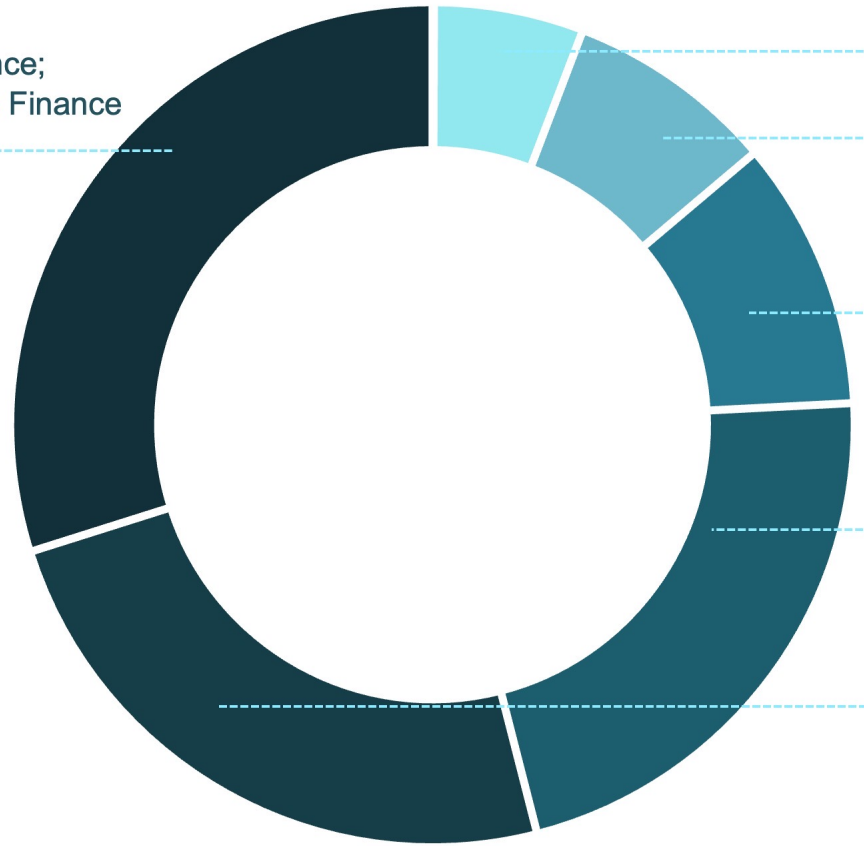


RGM is a key strategy for driving profitable growth and has gained significant traction over the past five years. RGM talent is in high demand, as the role requires a unique blend of finance, sales, and analytics expertise combined with strong leadership, influencing skills, and cross-functional understanding.

When building an RGM team, prioritize finding a seasoned leader with a proven track record of organizational development and cross-functional influence. Once the practice is established, ensure you create a clear career path for RGM team members. Without this, some talent may hesitate to transition into RGM, perceiving it as a lateral move rather than a step forward in their career. This concern is common in newer RGM practices.

Securing top talent in these critical RGM roles is essential. Establishing career paths not only aids in recruitment and retention but also ensures the development of a strong, agile team capable of delivering exceptional results.

What is the primary background of your organization's RGM Full-Time Employees?



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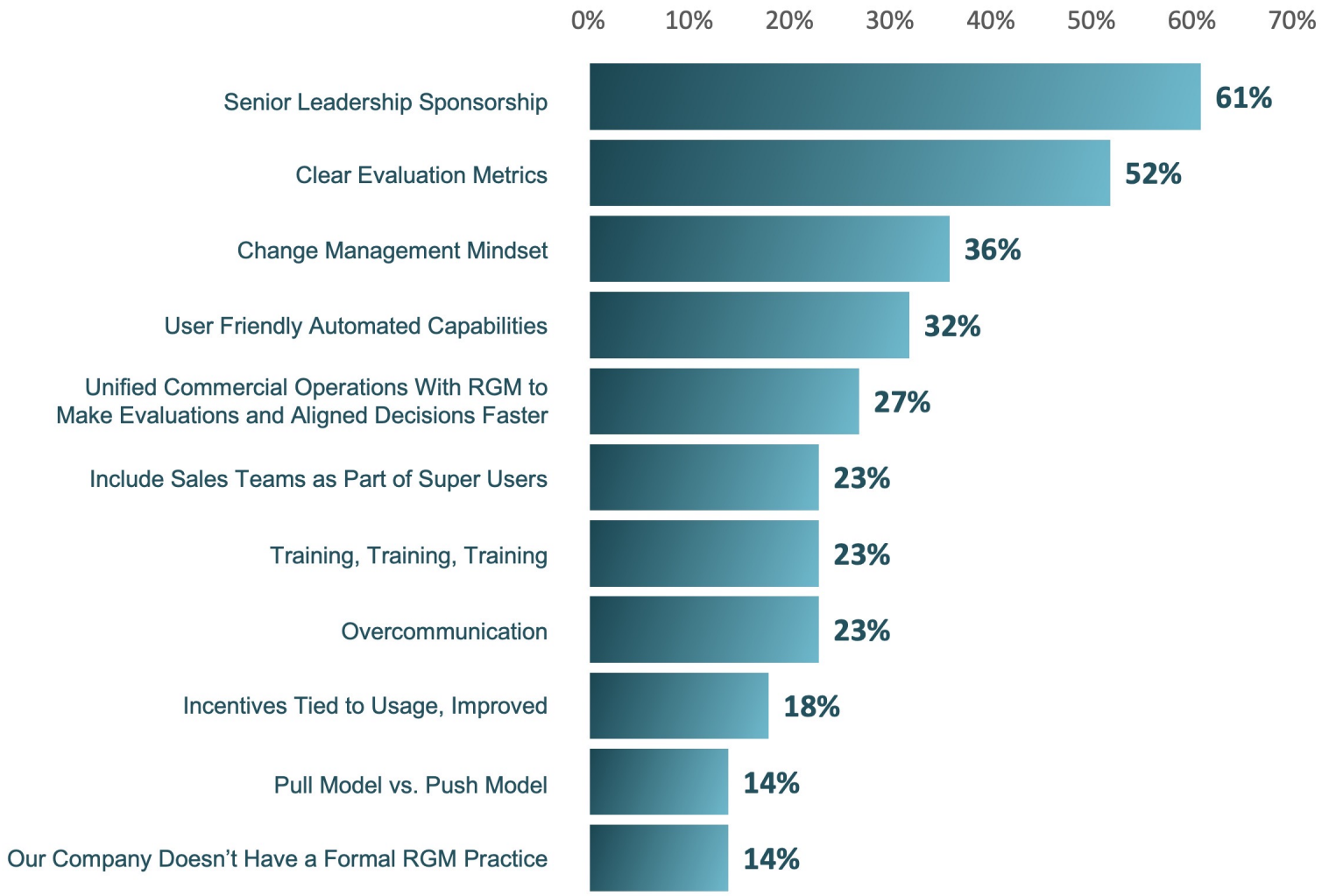
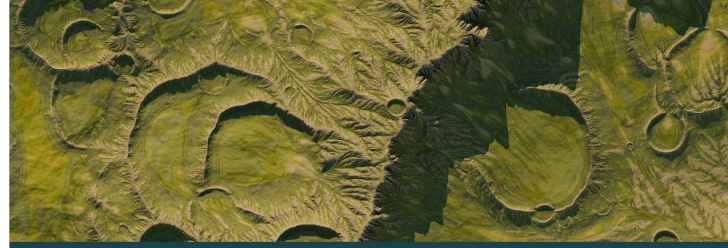
Executive Sponsorship and Clear Metrics Are the Primary Enablers of RGM Mindset Change

What have you found to be the most helpful as you bring along Sales partners and they learn, embrace, and gain an RGM mindset?





Leadership sponsorship, clear evaluation and measurement, and facilitating change management within the organization are essential to driving adoption.

Transforming an organization's RGM mindset is challenging and requires a deliberate change management process.

RGM mindset change requires visible executive sponsorship.

Clear metrics anchor accountability and credibility with Sales.

Tools and training accelerate adoption only after leadership alignment is established.

RGM adoption is a leadership and governance challenge first; technology and training amplify success, but do not substitute for sponsorship, metrics, and accountability.

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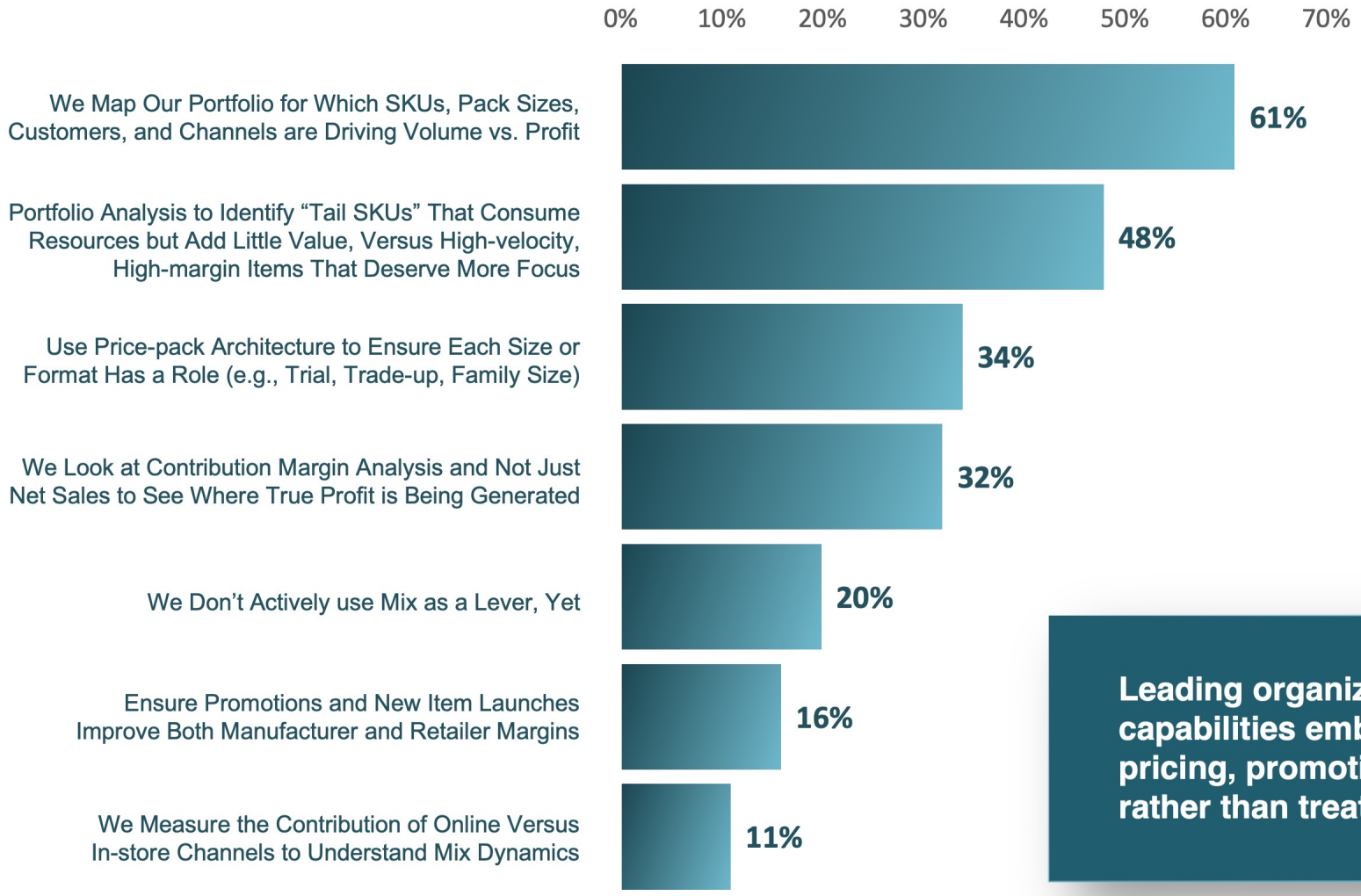
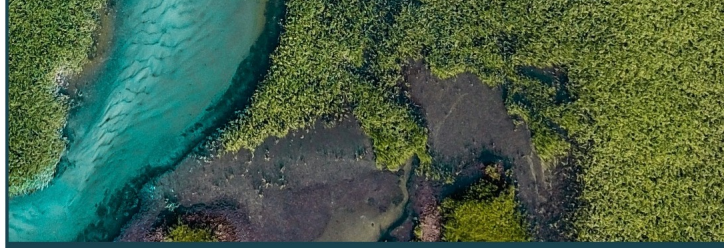
Most Organizations Use Mix to Understand Profit Pools—Fewer Actively Optimize It

How does your company leverage Mix to drive results?





Mix is widely analyzed, but less frequently optimized or actively steered.

Most organizations understand where profit resides across mix dimensions.

Fewer translate mix insights into price-pack, promotion, and channel actions.

Mix remains an underutilized lever for margin expansion and growth steering.

Unlocking mix as a growth lever requires moving beyond analysis to decision frameworks that actively steer portfolio, pricing, and promotions toward higher-margin outcomes.

Leading organizations and automated RGM capabilities embed mix optimization into pricing, promotion, and innovation decisions rather than treating it as a standalone analysis.

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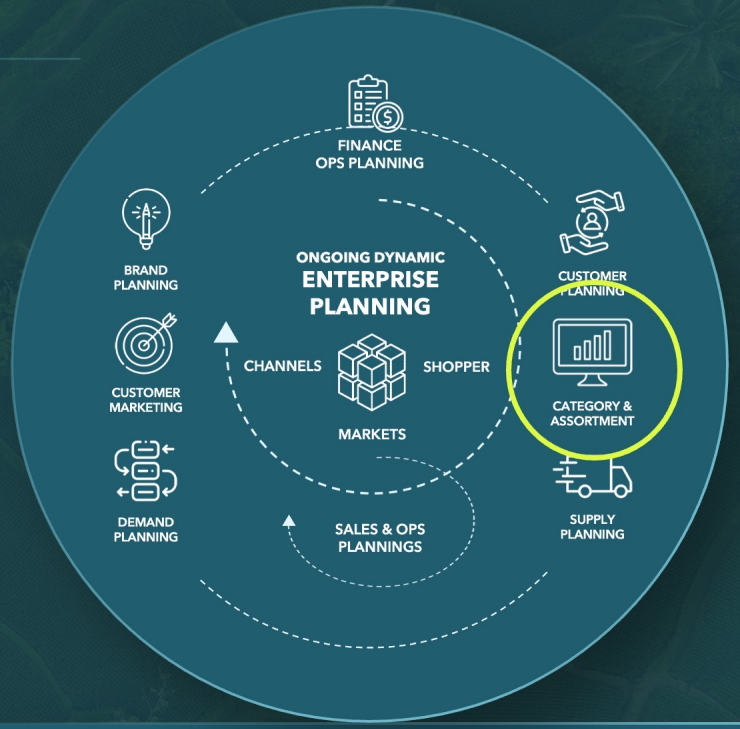
The Future State of RGM and Category Management: Single Value Engine

Category Management Integration into a Modern RGM Practice

Today's growth constraints — retailer scrutiny, margin pressure, execution risk — require manufacturers to operate as one system, not two functions.

RGM optimizes what and where to invest.

Category Management ensures those decisions translate into shelf reality, shopper conversion, and in-store growth execution. Providing the best customer experience.



RGM and Category Management must work in concert to drive value.

Why the disconnect exists:

Category Management has operated within manufacturers for 30+ years. Yet, RGM evolved over the last 15 years, primarily within Finance & later the Commercial Business Unit, to enhance financial rigor. As a result, these two functions, while parallel, have been disconnected value engines.

POI has identified an opportunity to enhance analytics and decision-making by integrating manufacturers' RGM and CatMan silos.

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Business Case for the Integration of RGM and Category Management

RGM Optimizes & Creates Value — Category Management Activates It

RGM determines price-pack architecture, promo depth, mix, and investment trade-offs. Category Management translates those decisions into:

- Assortment roles
- Shelf placement & adjacencies
- Space elasticity and facings

Without CatMan, RGM value often dies on the shelf.

The best RGM strategy fails if the shelf does not reflect the decision.

Assortment & Shelf Are Essential to In-Store Strategy and Execution

Category decisions directly influence:

- Incrementality vs. cannibalization
- Private label interaction
- Price perception & value cues

RGM models increasingly require assortment context to improve forecast accuracy and more realistically reflect ROI.

RGM decisions made in isolation risk optimizing the P&L rather than the category outcome.

Retailers Expect Integrated Category & Revenue Thinking

Retailers plan by category performance, not manufacturer P&Ls.

Stronger joint business planning occurs when:

- RGM insights are framed within category growth
- Assortment, pricing, and promo strategies tell one cohesive story

CatMan's credibility increases acceptance of RGM recommendations.

Without integration of RGM and Category Management, manufacturers risk over-investing in strategies that look optimal in models but underperform in-store.

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Activate RGM & Category Management As One Cohesive Unit

RGM without Category Management

→ Optimizes economics on paper

→ Risks poor shelf fit, weak conversion, retailer pushback

→ Delivers theoretical ROI

Category Management without RGM

→ Optimizes shopper logic and shelf

→ Lacks financial prioritization and investment discipline

→ Delivers activity without value maximization

When RGM and CatMan function as one cohesive unit, there is closed-loop value creation.

As retailers have a single point of contact with the manufacturer, the main responsibility of RGM and Cat Man is to equip the retailer-facing salesperson with a compelling selling story about the TOTAL opportunity.

→ RGM decides what deserves investment and coordinates cross-functionally

→ CatMan ensures that investment will convert on the shelf to drive the best consumer experience

→ Sales team sells the total investment opportunity promotional plans and items/price

RGM creates efficiency and value. Category Management achieves this through in-store growth & customer experience. One without the other results in value leakage. Activate RGM & CatMan as ONE cohesive unit.

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The Future State: Revenue Growth Management + Category Management as a Single Value Engine

POI Recommends Leading Manufacturers evolve to:

- Shared data, incorporated KPIs, and shared planning cadence
- Integrated analytics: elasticity + space + shopper behavior
- Closer alignment with Retail Execution and Perfect Store

To unlock value, manufacturers must evolve from functional optimization to enterprise value orchestration and formally integrate Category Management into the RGM operating model.

This creates One Single Value Engine—linking pricing, promotion, and mix decisions to assortment, shelf execution, and shopper conversion.



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Revenue Growth Management Framework and Practice Evolution

Many manufacturers ask how to start or evolve an RGM practice.

POI has broken down the RGM evolution into a framework of three phases based on POI Manufacturer Connects and share group input.

It is critical to focus on embedding the people and process aspects across the organization in addition to the technology enablers.

The ultimate goal is to achieve an RGM mindset across the enterprise. The most successful organizations embed the RGM enterprise mindset into their culture.

Whether you are getting started today or have an established RGM practice, there are POI resources and solution provider best practices to help you on your journey.

https://poinstitute.com

	PHASE 1: NEW RGM Operational	PHASE 2: INTERMEDIATE RGM Cross-functionally Champion, Expand, Imbed, Incent	PHASE 3: ADVANCED RGM Strategic End-to-End Value Chain
ORGANIZATION/ PEOPLE Build a Center of Excellence	CoE/global team: Dir/VP level 1-3 FTE Regional teams: Mgr/Dir level 1-2 FTE/region Local market teams: Mgr/Dir level 1-4 FTE/market	CoE/global team: Sr Mgr/Dir/VP level 3-6 FTE Regional teams: Mgr/Dir/VP level 2-3 FTE/region Local market teams: Analyst/Mgr/Dir/VP level 1-8 FTE/market	CoE/global team: Dir/VP level 5+ FTE Regional teams: Mgr./Dir/VP level 2-3 FTE/region Local market teams: Analyst/Mgr/Dir/VP level 1-8+ FTE/market
STRATEGY			
BUSINESS PROCESS Develop and socialize a clear strategy and roadmap, including the process of embedding an RGM mindset across the organization.	Develop a clear strategy. Build capability roadmap. Proof of concept. Focused on quick wins in key countries, customers, and brands. Gain Senior leadership support. Identify key metrics. Drive Joint Value Creation. Communicate enterprise revenue management vision. Engage key stakeholders across the organization and socialize early benefits & wins by business unit. Set the stage for broader deployment.	Begin scaling RGM capabilities across a broader subsegment of the organization. Integration of the RGM mindset into working business processes. Top-down drive from senior leadership on business priorities linked to RGM (e.g., drive profitability). End-to-end alignment on key organizational metrics enabled by RGM (e.g., gross Profit, Gross Margin, Cash Flow, etc.) Standardize basic RGM tools across customers/markets.	Continue to scale RGM capabilities to capture the full enterprise and broaden the RGM mindset into additional business processes. Linkages between marketing, finance, sales, demand planning, and supply chain are realized. Automation of capabilities across the full enterprise are gaining efficiencies that are communicated broadly, and processes are evaluated as the work has become less tactical and more strategic. Need to evaluate process as the "work changes."
ANALYSIS & REPORTS Turning data into actionable analytics and insights	**Pricing Diagnostics** Price Ladders Price Pack Curves Pricing Trends/Progression **Promotion Diagnostics** Trade Promo ROI Promotion what-if scenarios Improved inputs into S&OP Planning **Assortment** SKU Profitability/Priorities (Power Rankings)	Utilize more Advanced Analytics/Tools/Capabilities: Price Elasticity Trade Promotion and Pricing Optimization Mix Analysis Purchase Structures Market Segmentation Trade Analysis (Gross to Net, Margin Pools, etc.) Channel Management Advanced Scientific S&OP Planning Cost to Serve	Advanced Consumer Segmentation: Link RGM analytics to consumer landscape with insights & research (Shopper, Occasions, Trip Mission, etc.) to uncover retail and shopper dynamics Deduce industry and category trends and develop category growth stories for customers Trade architecture Evaluate innovation potential and execution Competitive strategy & war-gaming Personalized consumer offers Farm to Table – Value Chain Forecasting
SYSTEM & CAPABILITIES	Excel Tableau Begin investigating automated capabilities (Reach out to POI for the EPx Vendor Panorama)	Automated RGM capabilities* (RGM suite and/or TPMx with RGM capabilities). Ensure models are updated regularly, and model price, promo, and mix are updated simultaneously. Provide adequate training for each role.	Utilize predictive and prescriptive analytics (*Phase 2 & 3 combined depending on the vendor or capability of choice and manufacturer roadmap & phasing approach).
RGM LEVERS	Price Strategy & Architecture	Promo Strategy & Management	Mix/Assortment Management Investment Architecture, ROI & Trade Optimization Portfolio & Brand Strategy Including Innovation

Data- The RGM practice typically isn't the enterprise data owner, yet core work is dependent on a quality data foundation

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POI RGM Trainings & Certification

POI RGM Training Courses:

Demystify RGM for Organizations™

Helps cross-functional teams understand Revenue Growth Management and its key pillars. Builds a shared RGM language so teams understand their role in driving profitable growth and enabling collaboration and change.

Implementing RGM with Retailers™

Execution is what delivers results. This course approaches RGM from a retailer perspective. Participants learn how to shift from transactional selling to strategic, value-based RGM planning with retail partners.

RGM Essentials for Senior Leaders & Executive Teams™

Designed for senior leaders looking to accelerate RGM impact across their organization. Covers common pitfalls and how to remove organizational barriers on the RGM journey.

RGM Basics for Sales Teams™

A hands-on course equipping sales teams with practical RGM skills. Focuses on pricing, promotion, mix optimization, and leading stronger, data-backed conversations with retailers.

POI RGM Foundation Certification™

The RGM Foundation Certification™ is a comprehensive, three-course training program designed to develop practical Revenue Growth Management (RGM) skills within consumer-packaged goods (CPG) organizations. This interactive program equips cross-functional teams with a unified understanding of the five RGM pillars: pricing, promotion, trade, mix, and analytics. Participants will gain the confidence to apply RGM principles in their daily decision-making.

Through hands-on exercises, real-world case studies, and retailer-ready tools, participants will learn how to effectively convert data into actionable insights, enhance their pricing and promotion strategies, and foster better collaboration across functions and with retail partners.

Need to evolve your organization quickly and embed an RGM mind-set? POI can train and certify your teams at your National Sales Meeting.

Visit the POI Website for more information and to register for your training https://poinstitute.com/training/

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RGM leadership, at any stage of maturity, requires disciplined, servant leadership to navigate sustained commercial volatility.

Achieving cross-functional alignment depends less on authority and more on active listening, clear communication, and the ability to connect insights to enterprise outcomes.

Effective RGM leaders use data-driven storytelling to articulate business impact, align priorities across silos, and negotiate trade-offs that balance local needs with enterprise value.

Leaders who successfully combine analytical rigor with strong interpersonal skills are best positioned to mobilize organizations, demonstrate value to stakeholders, and maximize returns on investments in people, processes, and technology.

Sustained RGM impact is ultimately a leadership challenge — Organizations that invest only in tools and analytics without developing influence, communication, and change leadership will struggle to scale results.

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Marketing

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Marketing, Trade, and Ecommerce Investment Convergence

CPG manufacturers are experiencing a fundamental shift in how commercial investments are planned, funded, and measured. Traditional lines between **marketing, trade promotion**, and **eCommerce** are rapidly blurring as retailers increasingly expect **retail media investment** and omnichannel execution to support both in-store and digital growth.

What was once clearly defined funding now overlaps across functions, creating **ambiguity about ownership**, **budget tension**, and **inconsistent performance measurement**. Ecommerce and retail media often sit between Sales and Marketing, drawing from existing trade and marketing budgets rather than incremental investment, while accountability for results remains unclear.

Despite increased spend, many manufacturers struggle to validate return on investment due to **disconnected planning processes**, **fragmented data**, and **limited visibility into incrementality and halo effects**. As a result, spend is frequently reallocated rather than optimized, limiting true revenue and margin growth.

Without connected planning and closed-loop measurement, manufacturers risk increasing complexity and spend — without delivering sustained growth or investment conviction.

To succeed, CPG leaders must shift from managing investments in silos to managing a **single, connected commercial investment portfolio**. This requires clear decision rights, alignment across TPMx, RGM, marketing, and IBP, and modern measurement capabilities that balance short-term performance with long-term brand and customer value.

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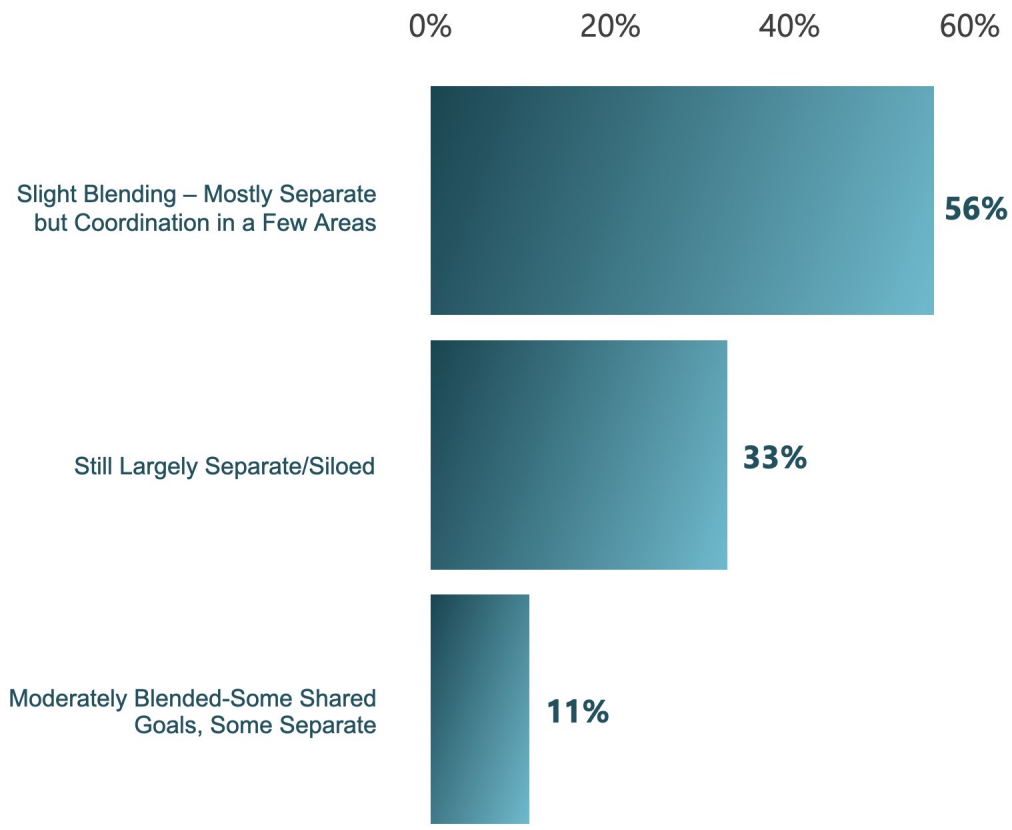
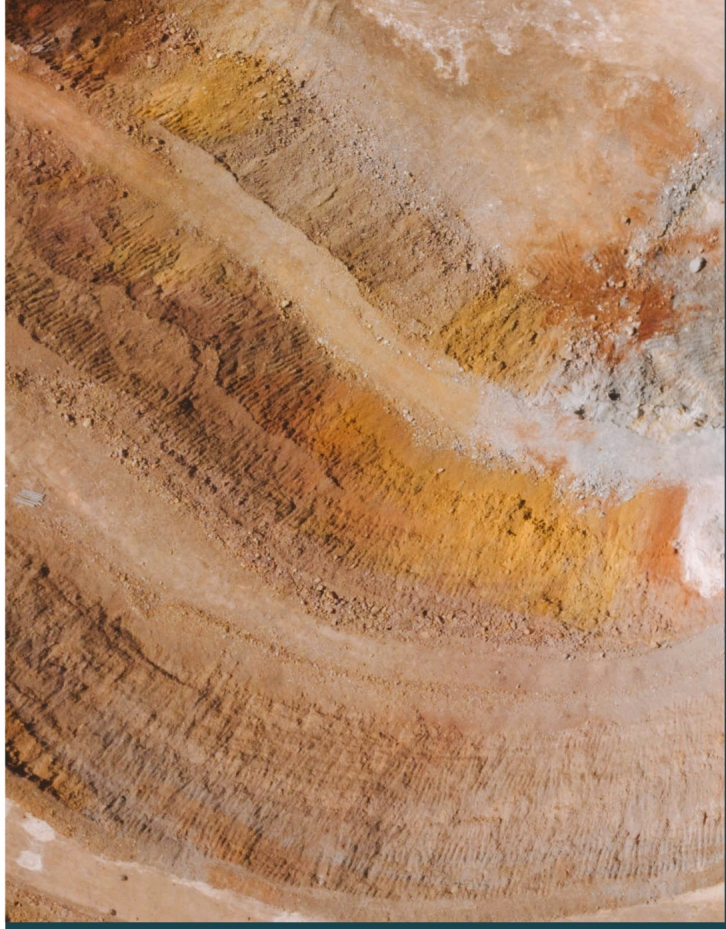
The CPG Industry Needs to Break Down Siloes between Marketing and Trade Spending

To what extent is your organization removing the siloes between Trade spending (e.g. promotions, display, merchandising) and Media spending (ads, digital, brand marketing) in planning/budgeting?





Unify trade and media planning around shared growth outcomes, not budget ownership.

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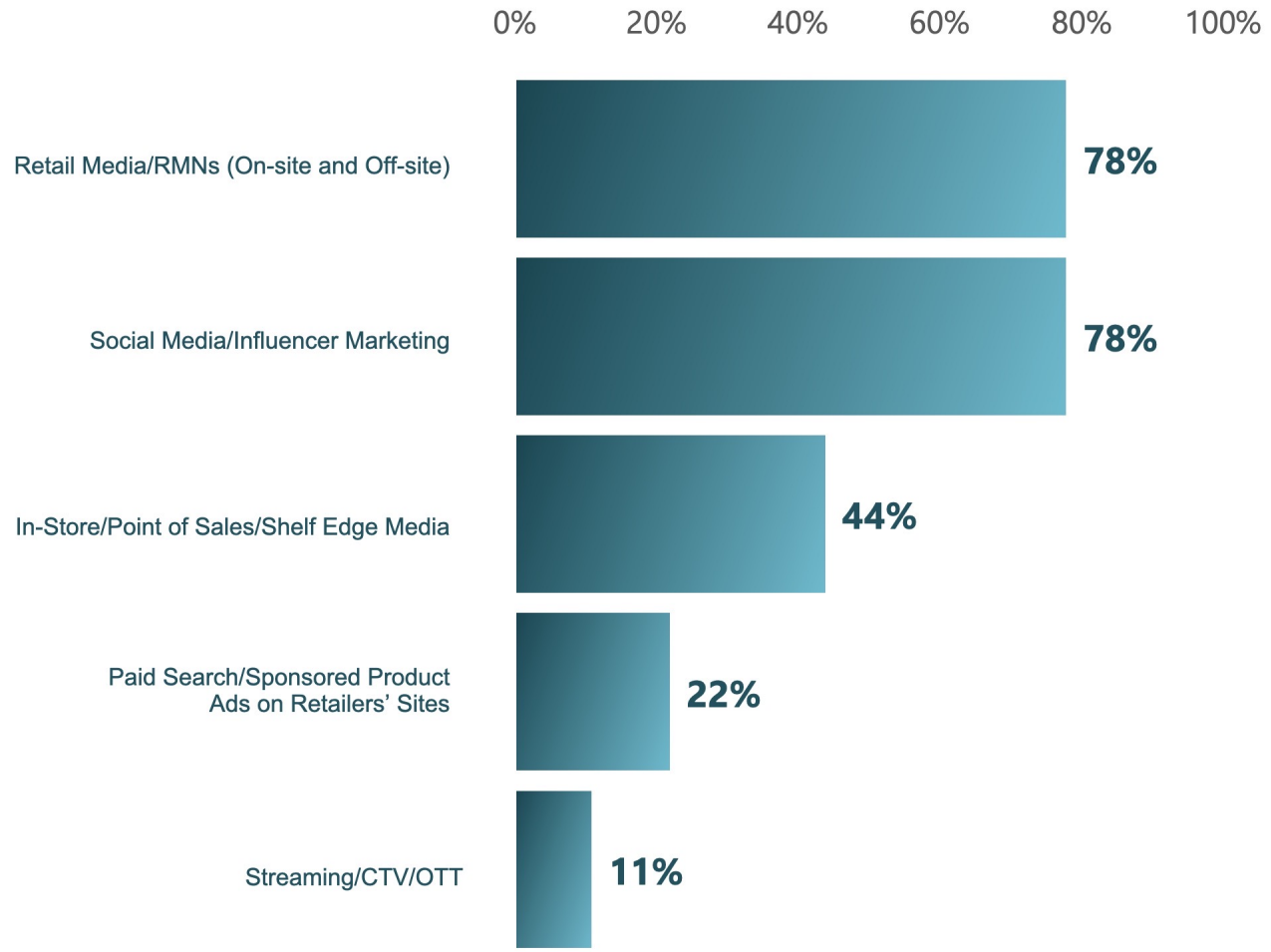
Marketing Channels Driving Incremental Growth

Which marketing channels do you believe drive the most incremental growth (beyond baseline) for CPG in today's environment? (Choose top 3)



Retail Media is now among the **top drivers of incremental growth (78%).**

Another **78%** of incremental growth is driven by **social media and influencer marketing.**

In-store, **at the shelf, marketing** comprises **44%** of the incremental growth.

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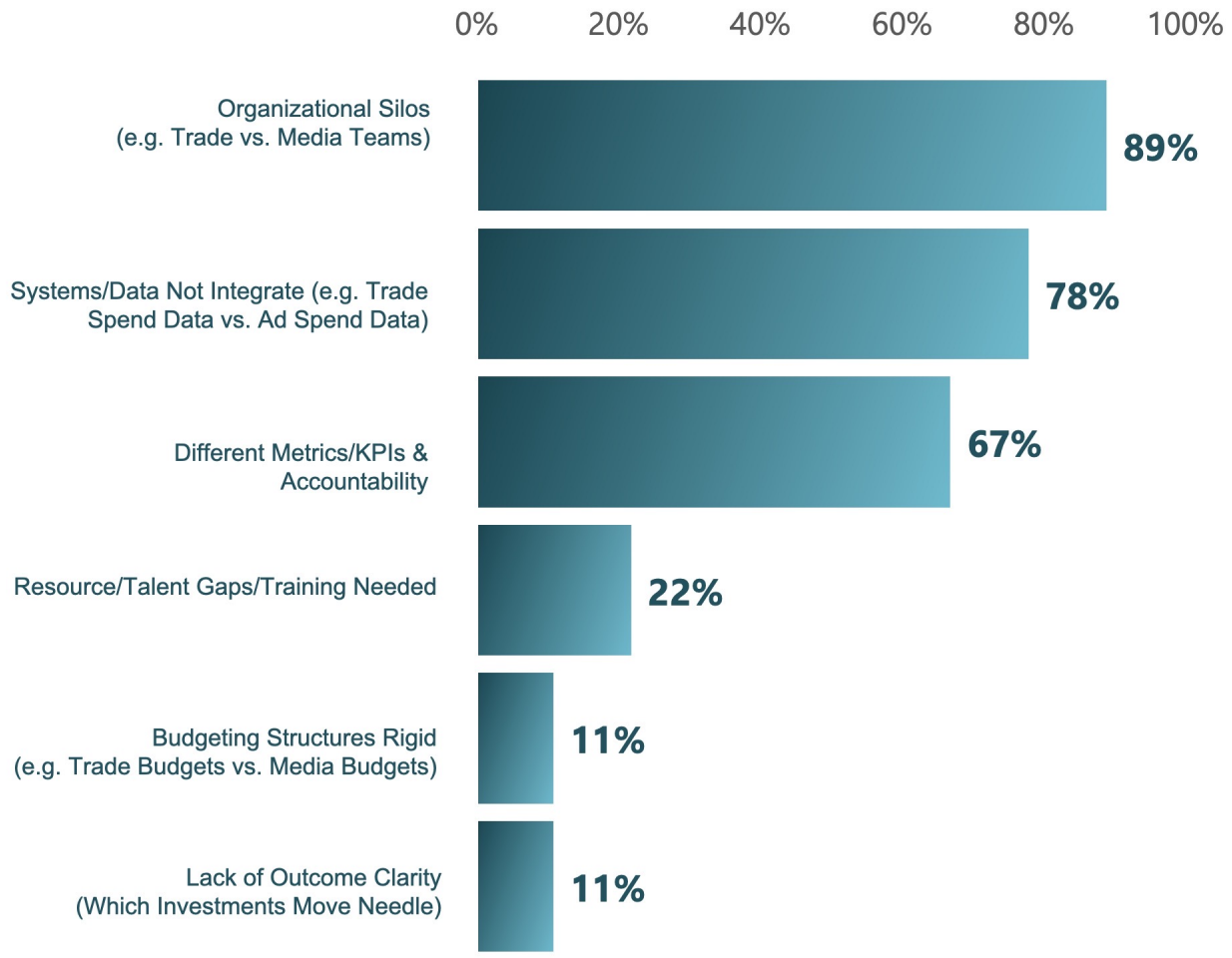
Barriers to Unified Trade + Media Planning

What are your top three barriers to unified trade + media planning?



Organizational silos and disconnected systems & data remain the biggest blockers to unified planning.

Break silos by aligning teams on shared KPIs, data, and decision rights.

Trade and Marketing teams need to have aligned KPI's and incentives.

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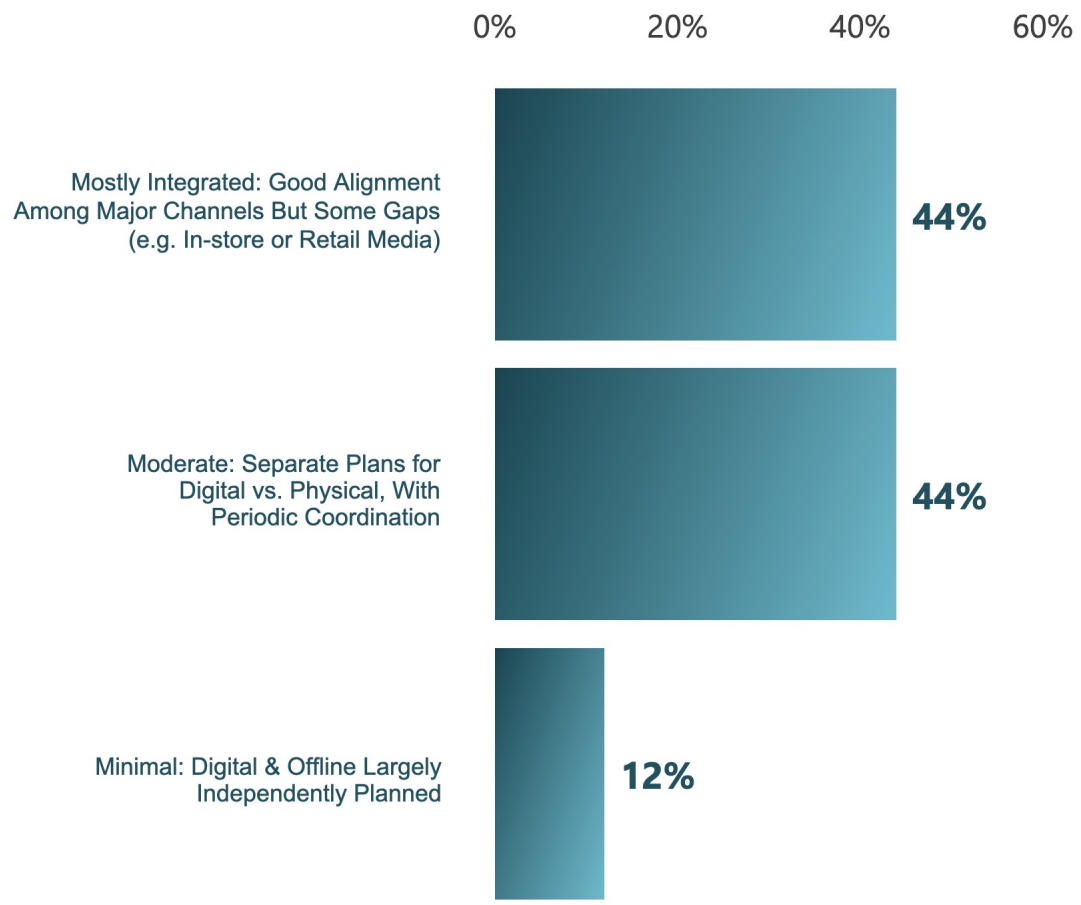
Omnichannel Marketing Maturity

Which of the following best describes your approach to omnichannel marketing planning?





Many CPGs claim omnichannel planning, yet execution remains fragmented.

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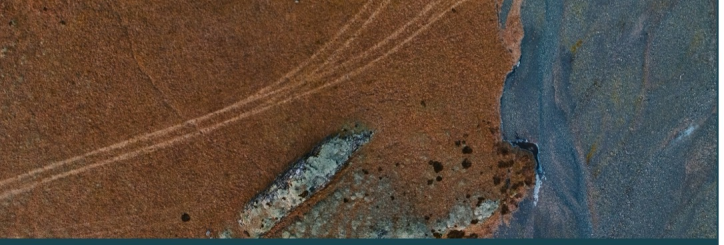

Leadership Priorities:

Elevate digital marketing from executional support to a **growth-driving capability.**

Align digital strategy directly to **commercial outcomes**, not channel performance.

Fund digital marketing based on **incrementality, not historical spend patterns.**

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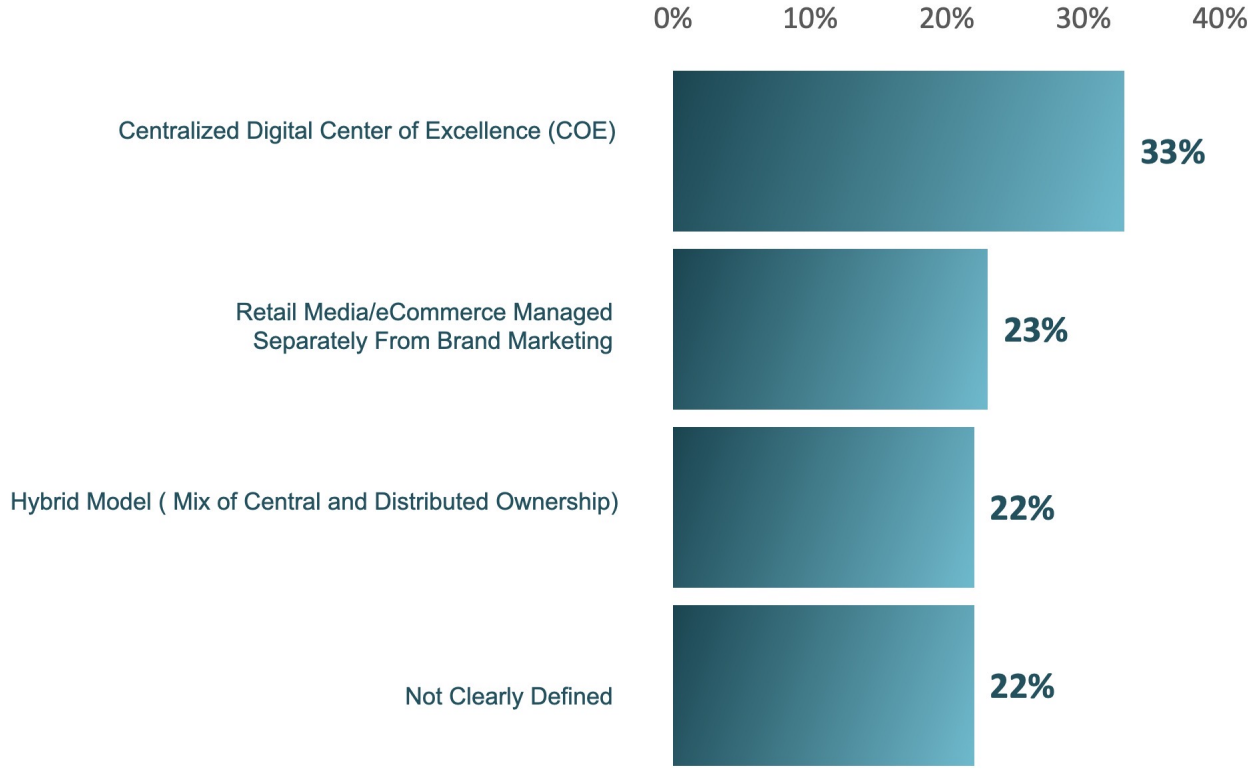
Digital Marketing Is Now a Core Growth Engine - Not a Support Function

How is the responsibility for digital marketing structured in your organization?





Leadership Priorities:

Expedite **data integration** across trade, media, and commerce.

Eliminate fragmented decision-making driven by disconnected tools.

Build a **single view** of total investment → activation → outcome.

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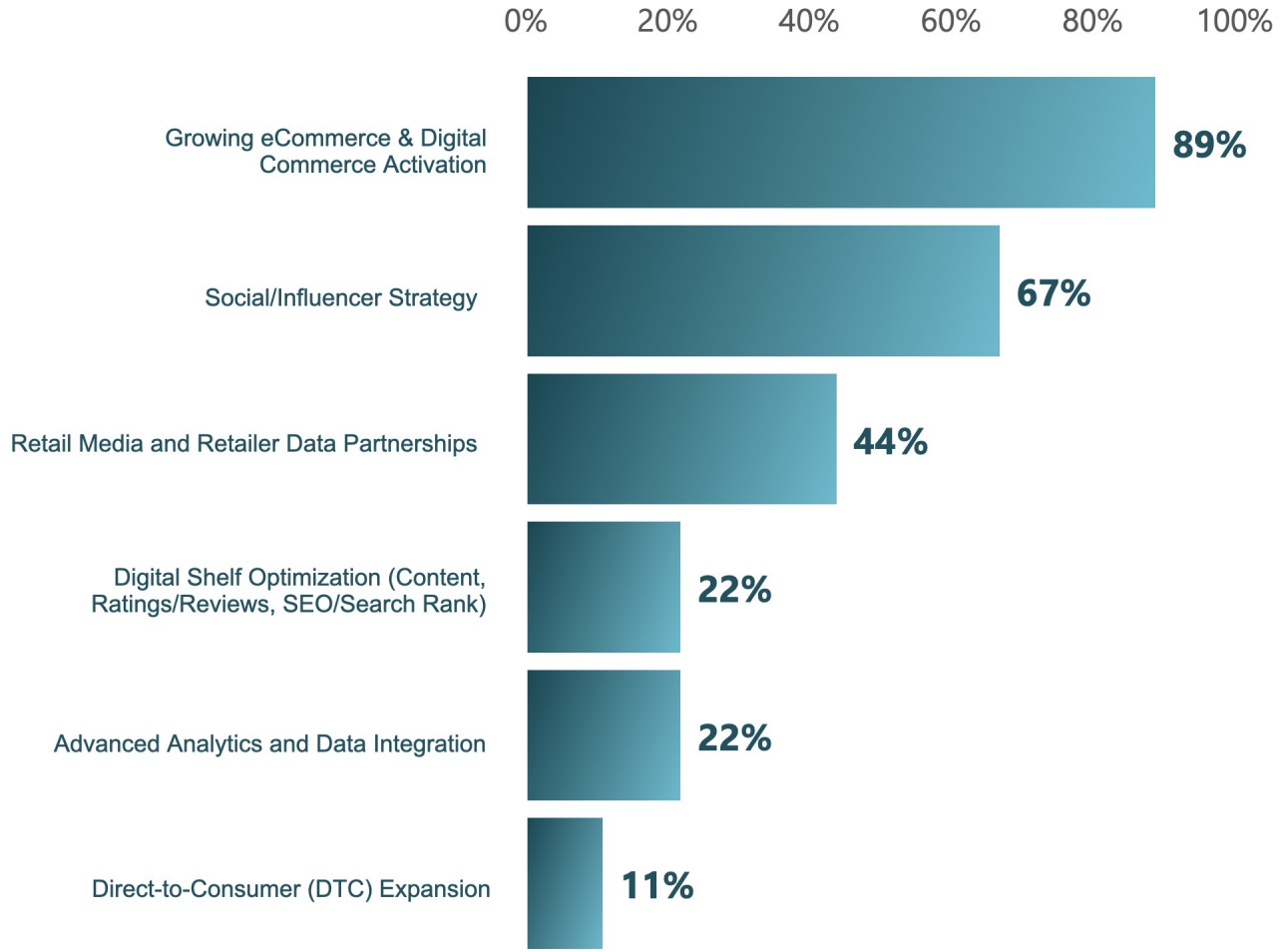
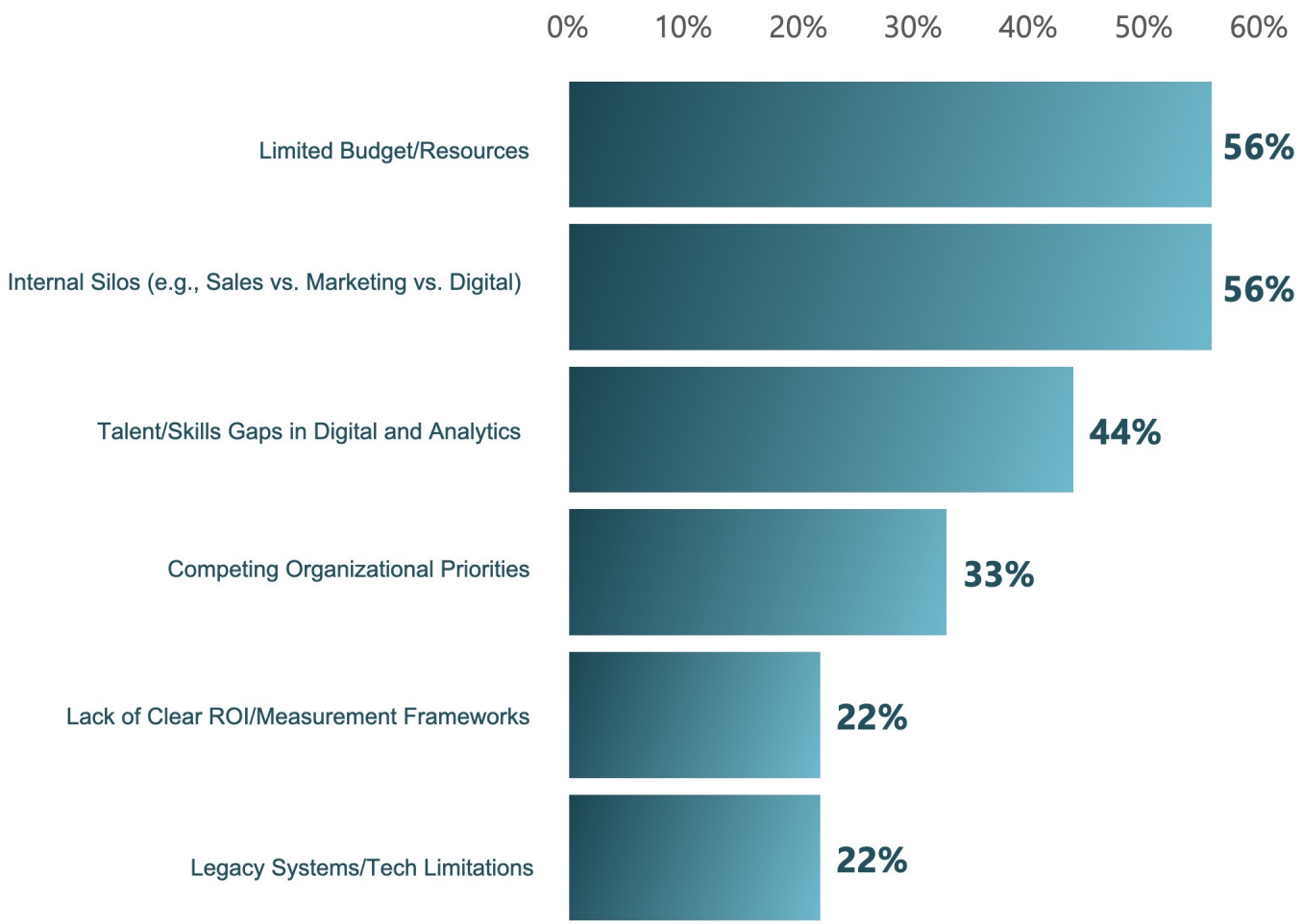
Transformation Requires Connected Data, Analytics, and Activation

Which digital priorities are most important for your organization in the next 12–24 months? (Select top 3)



Digital Transformation Is an Operating Model Shift, Not Solely a Technology Upgrade

What are your top 3 barriers to accelerating digital transformation in marketing?



Leadership Priorities:

Redesign roles, processes, and governance alongside technology.

Shift from channel ownership to **cross-functional decision accountability.**

Enable **faster test-and-learn** cycles tied to measurable growth impact.

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Trade, Media, and Measurement Are Converging Across the Omnichannel Landscape, As First-Party Retail Data Changes the Game…

As trade and media investments increasingly overlap across physical and digital channels, siloed planning and budgeting make it harder to drive profitable growth.

Retailers and manufacturers are testing new levers across in-store, eCommerce, and digital media, but disconnected ownership and measurement slow progress and dilute impact.

Retailers and manufacturers can gain insights into consumer behavior by collecting data on when and why purchases are made. This information helps them determine which innovative products to create and how to price and distribute them effectively.

With the growing restrictions on third-party cookies and the increasing demand for personalized, targeted consumer offers, leveraging first-party data will be essential.

Leadership Priorities:

- Break down trade and media silos to enable cohesive omnichannel investment decisions.
- Align sales and marketing around shared growth and profitability outcomes.
- Advance toward holistic measurement across trade, media, and digital activation.

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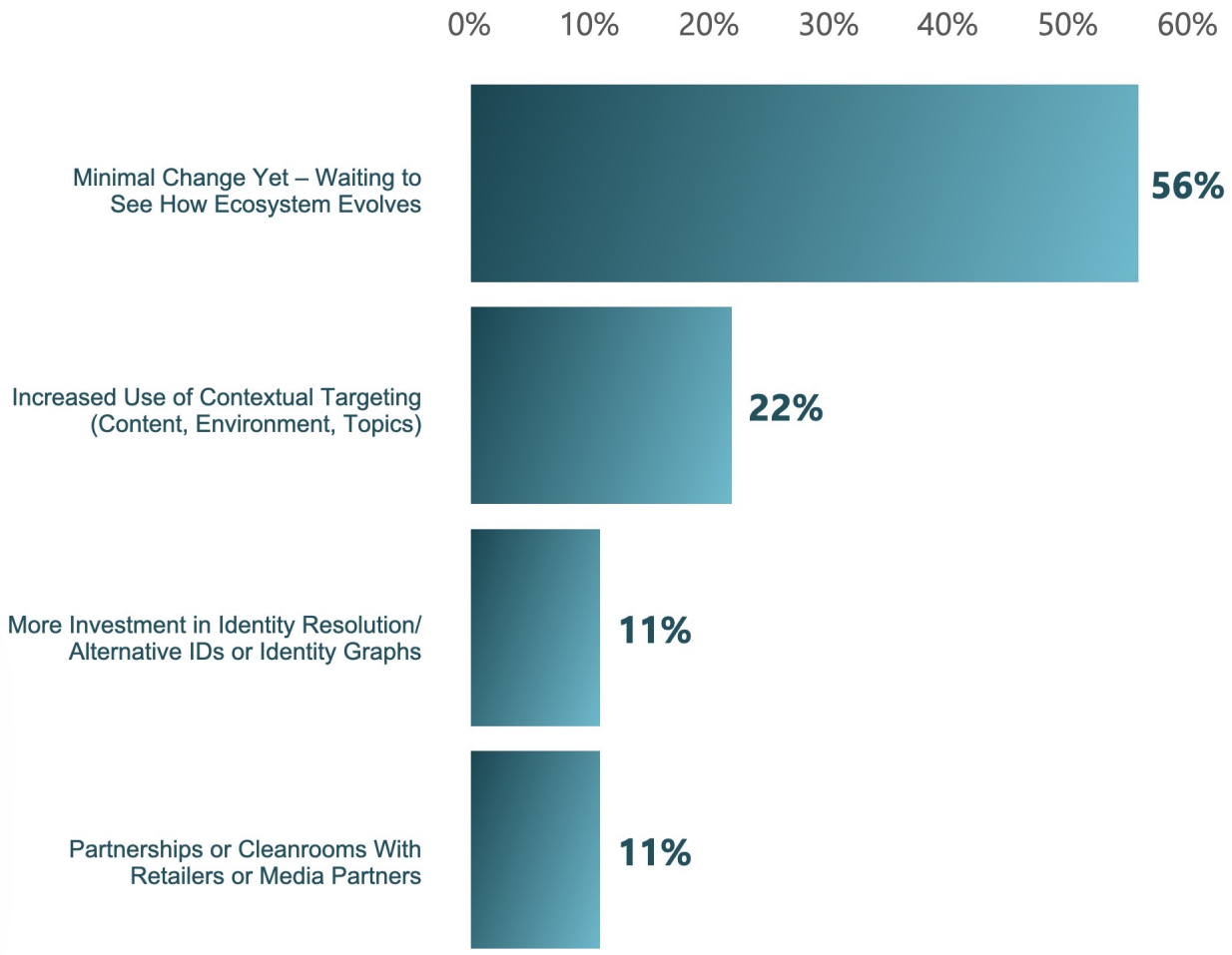
The Decline of Third-Party Cookies Is Forcing a Data Reset

How are you approaching the decline of third-party cookies in your digital strategy?



Leadership Priorities:

Accelerate investment in **first-party data strategies** and identity resolution.

Strengthen **retailer and media partner collaborations**, including clean rooms.

Expand the use of **contextual targeting** to maintain relevance and reach.

As third-party cookies disappear, most manufacturers are still in early or experimental stages of adapting their digital strategies.

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Implications for Marketing With Elimination of 3rd Party Cookies

Advertising and Marketing Challenges

- Without third-party cookies, targeting specific consumer segments becomes more challenging
- This could reduce the effectiveness of ad campaigns and increase the cost of acquiring customer data

Customer Insights and Analytics

- Limitations in tracking consumer behavior across different websites
- This impacts our ability to offer personalized experiences based on detailed behavioral data

Privacy and Compliance

- There's a greater emphasis on collecting first-party data directly from customers
- Invest to ensure compliance with data privacy regulations like GDPR and CCPA

So… What Can Be Done?



Contextual and First-Party
Advertisers will need to pivot towards strategies that leverage first-party data and contextual advertising rather than relying on third-party tracking.



Investing in Privacy-Compliant Solutions
Brands must invest in tools and technologies to comply with privacy regulations and effectively gather and analyze first-party data.



Enhanced Focus on User Engagement
Building direct relationships with customers through loyalty programs, subscriptions, and personalized experiences is increasingly important.

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First-Party Data and Prescriptive Insights Are Becoming Competitive Differentiators

Without third-party cookies, targeting, measurement, and personalization become more complex. Success now depends on high-quality first-party data, privacy-compliant technology, and the ability to translate insights into scalable, prescriptive actions across teams.

Leadership Priorities:

Invest in **privacy-compliant data and analytics foundations.**

Shift from providing descriptive insights to offering **prescriptive, next-best-action capabilities** that autonomously analyze intercorrelations in the data, enabling scalable and actionable insights.

Build direct consumer relationships through **engagement, loyalty, and personalization**.

Scalability and speed will be crucial for manufacturers as they establish direct relationships with consumers through engagement, loyalty, and personalized experiences, and promote directly to them.

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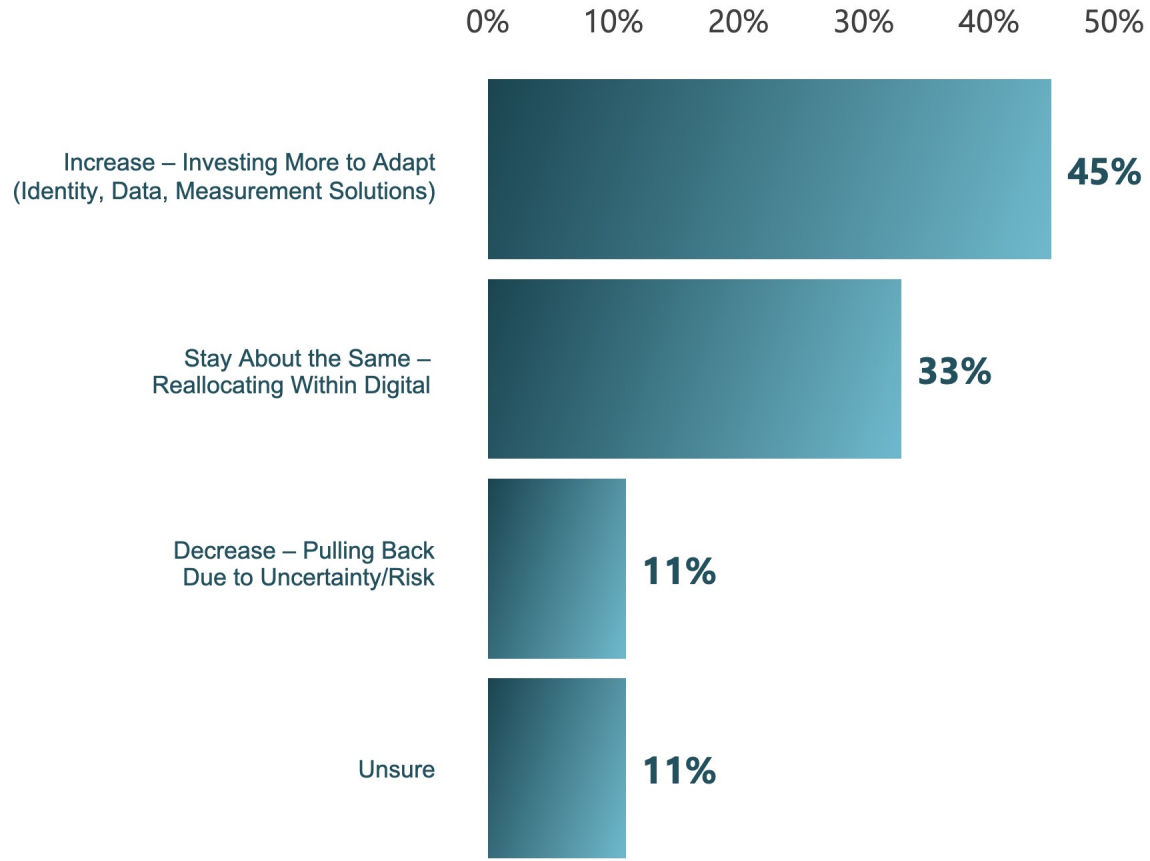
Digital Marketing Spend Must Be Optimized and Reallocated for Performance

How do you expect your overall digital marketing budget to shift in response to trends over the next year?





Leadership Priorities:

Protect high-performing digital investments by **optimizing for performance and proving incrementality.**

Reallocate spend dynamically based on measured impact, not historical practices. Collaborate with RGM teams to evaluate retailer-specific **total investment**, including its digital marketing strategy and funding.

Shift budget conversations to optimized performance and growth, away from simply "cost control."

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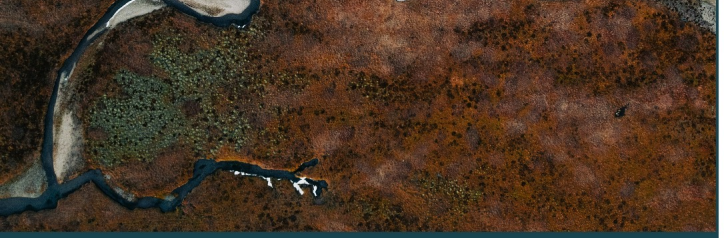


Leadership Priorities:

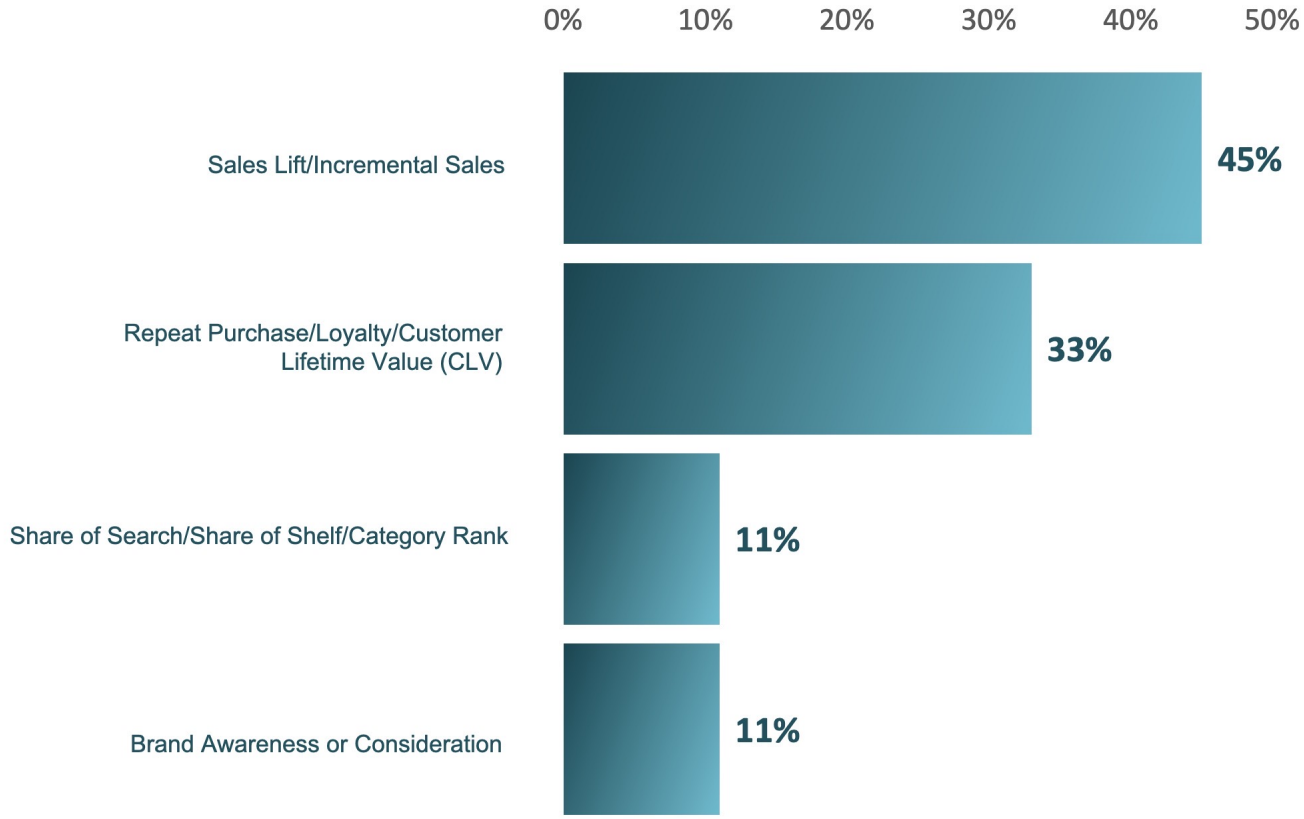
Move beyond reach and engagement to **sales, margin, and ROI-based KPIs.**

Standardize performance metrics across trade, media, and digital.

Hold teams accountable for **total business outcomes and impact, not channel-specific outputs.**

Marketing Performance Is Shifting From Activity to Outcome Based Metrics

What metrics/KPIs are you increasingly using or intend to use to assess marketing performance?



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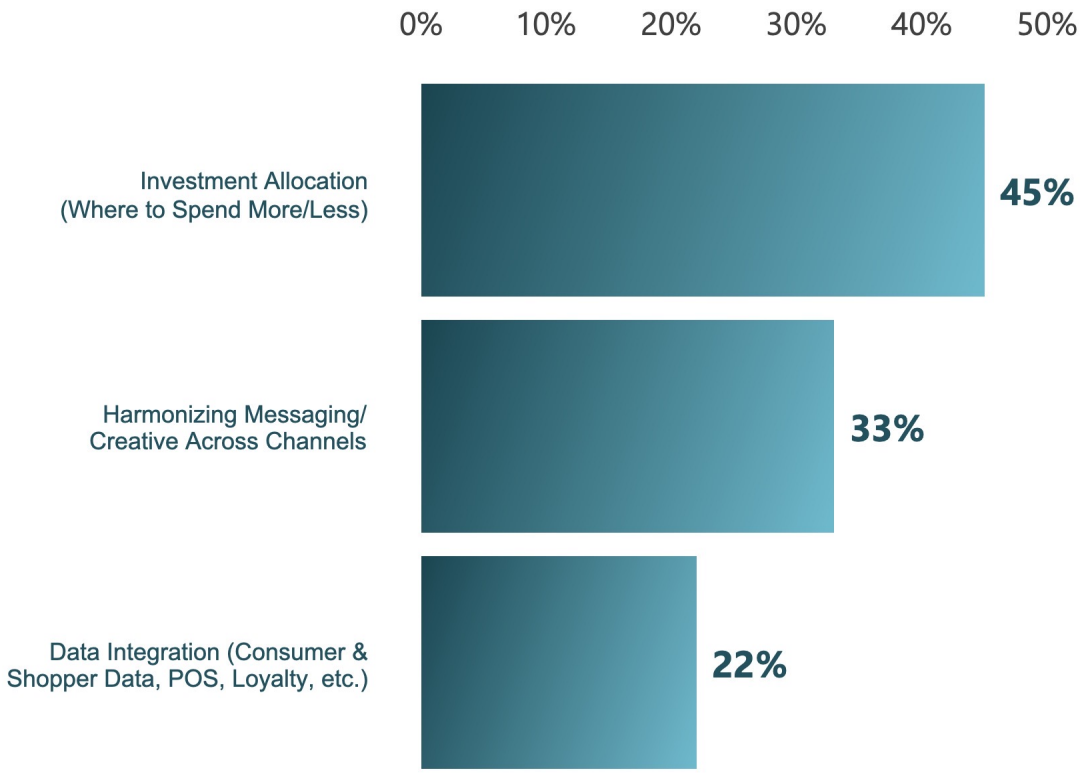
Omnichannel Optimization Depends on Utilizing the Right Growth Levers

When optimizing omnichannel plans, which of these is your biggest lever?





Leadership Priorities:

Focus optimization on the **levers that drive incremental growth.**

Balance pricing, promotion, media, and execution **decisions holistically.**

Enable faster scenario testing to **reallocate in-flight investment.**

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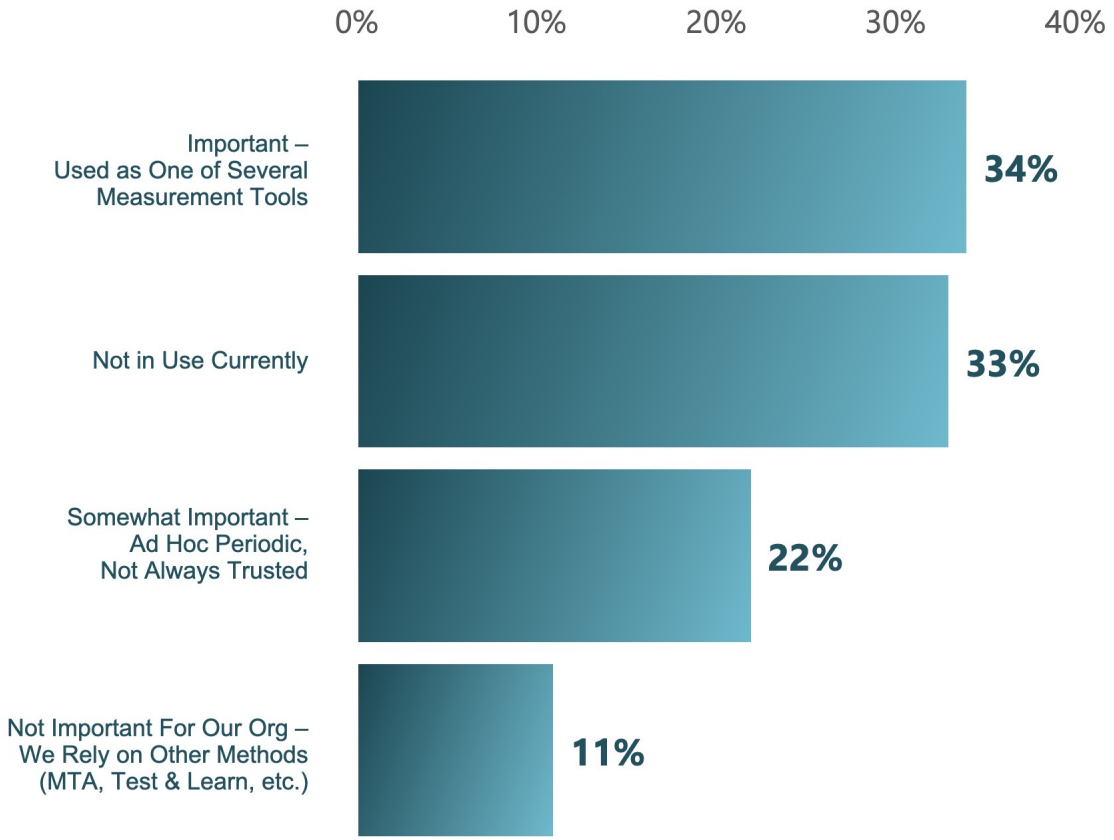
Marketing Mix Modeling Is Valuable, But Not Sufficient on Its Own

How important is Marketing Mix Modeling (MMM) to your marketing strategy?



Leadership Priorities:

Treat Marketing Mix Modeling (MMM) as **a valuable input**, not the single source of truth.

Complement MMM with **test-and-learn, in-flight measurement, and activation data.**

Set expectations that MMM informs strategy, not real-time decisions.

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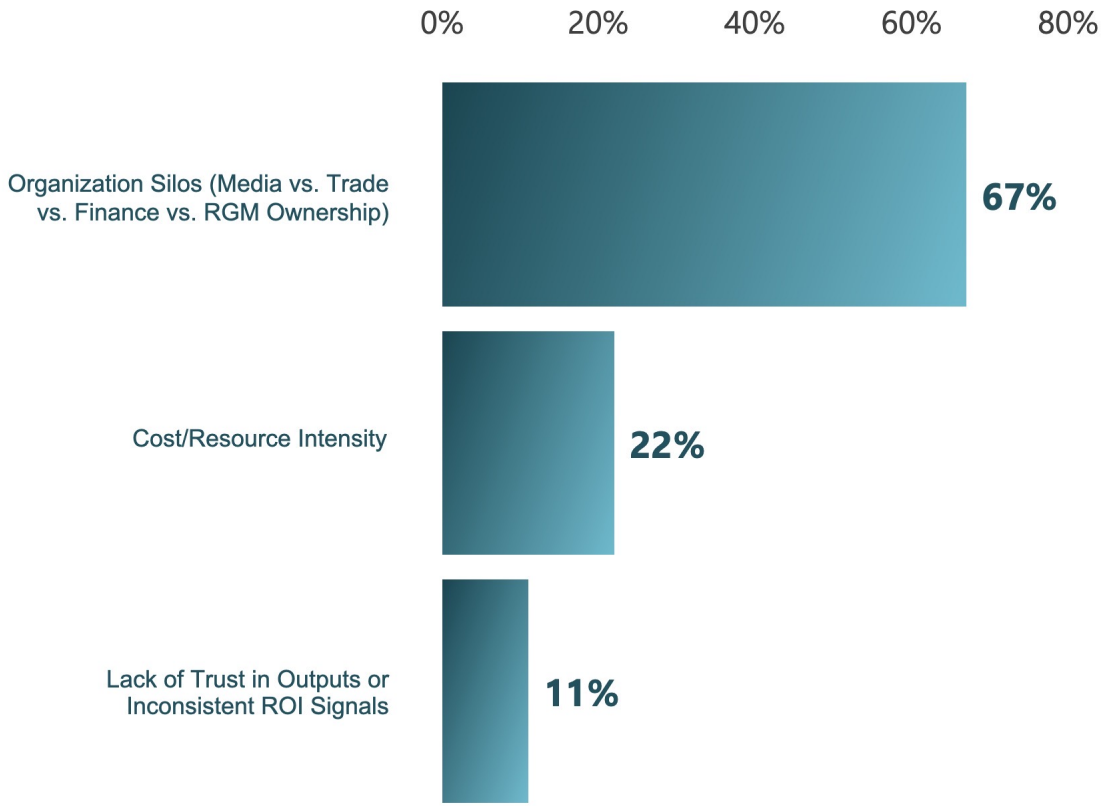
Marketing Mix Modeling Struggles When Media & Trade Are Evaluated Separately

What is your biggest challenge with using MMM to optimize both media and trade?





Leadership Priorities:

Modernize the Marketing Mix Model (MMM) to **incorporate omnichannel strategies and the convergence of trade and media.**

Integrate models to include promotion, pricing, and retail media signals.

Use MMM outputs to **guide investment direction,** then optimize in execution.

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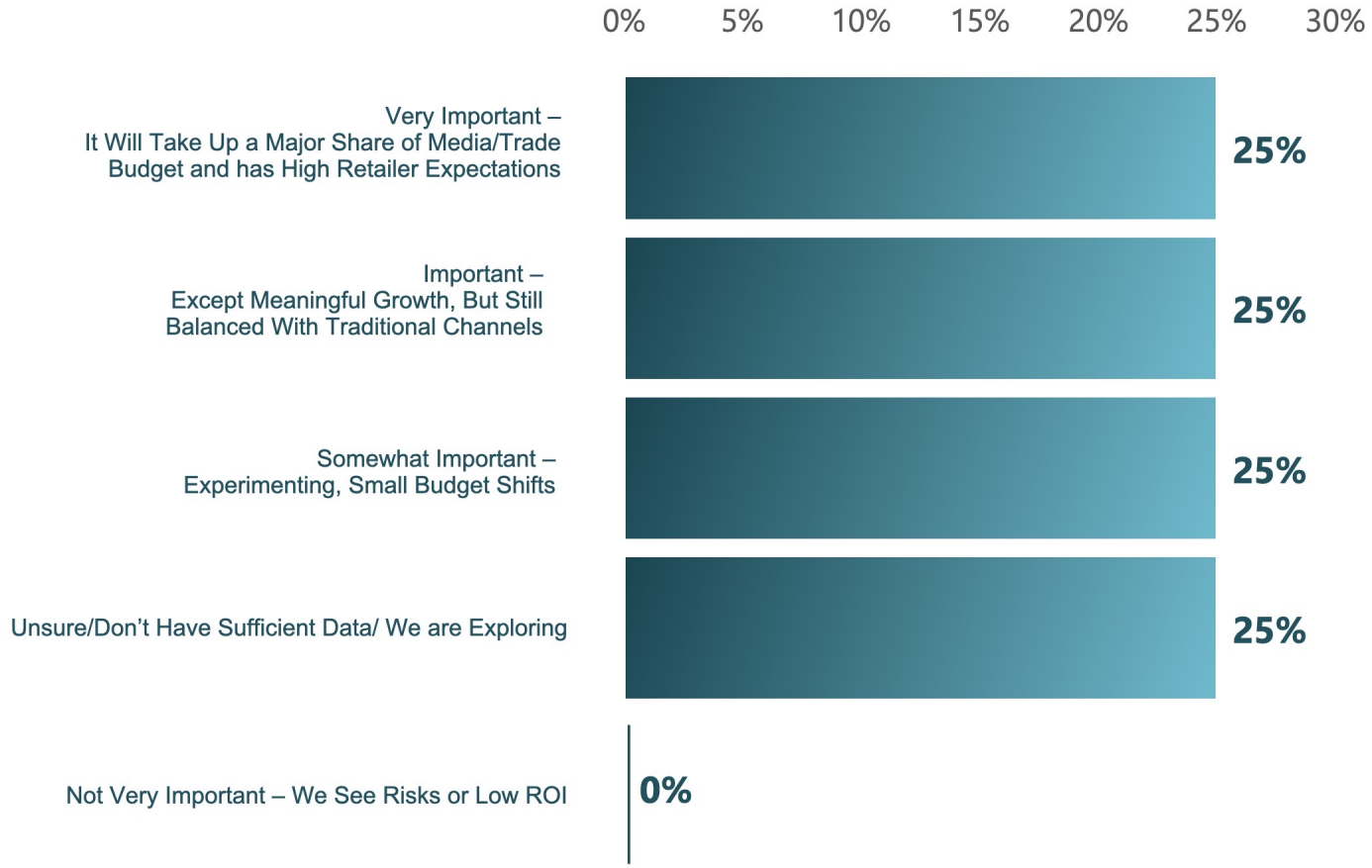
Retail Media Is Becoming a Core Commercial Investment

How important is retail media (retailer-owned media networks) to your marketing/media strategy in the next 12 months?



Leadership Priorities:

Treat retail media as a **strategic growth lever,** not an experimental line item.

Plan retail media **alongside trade and brand investments.**

Set clear expectations for retail media **incrementality and ROI** within your organization and with retailers.

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Leadership Priorities:

Prepare for increased **pressure from retailers** to fund retail media.

Align retail media investment **to mutual growth objectives,** in addition to execution compliance.

Balance retailer expectations with **brand and profitability goals.**

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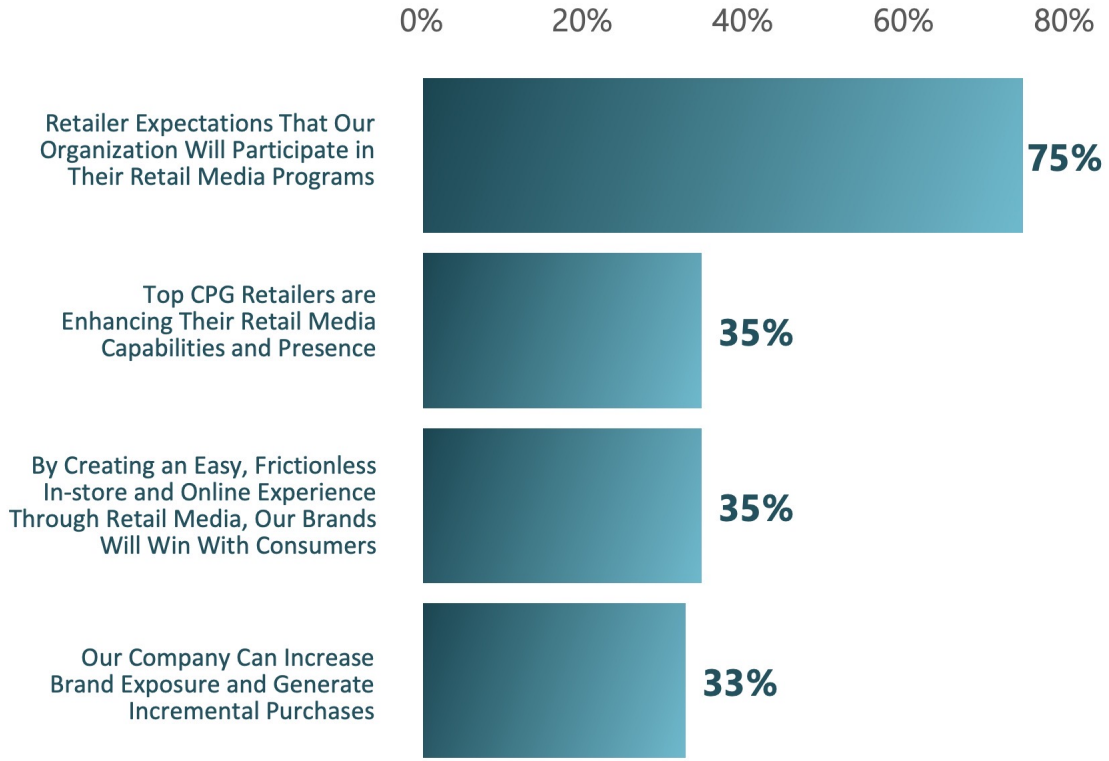
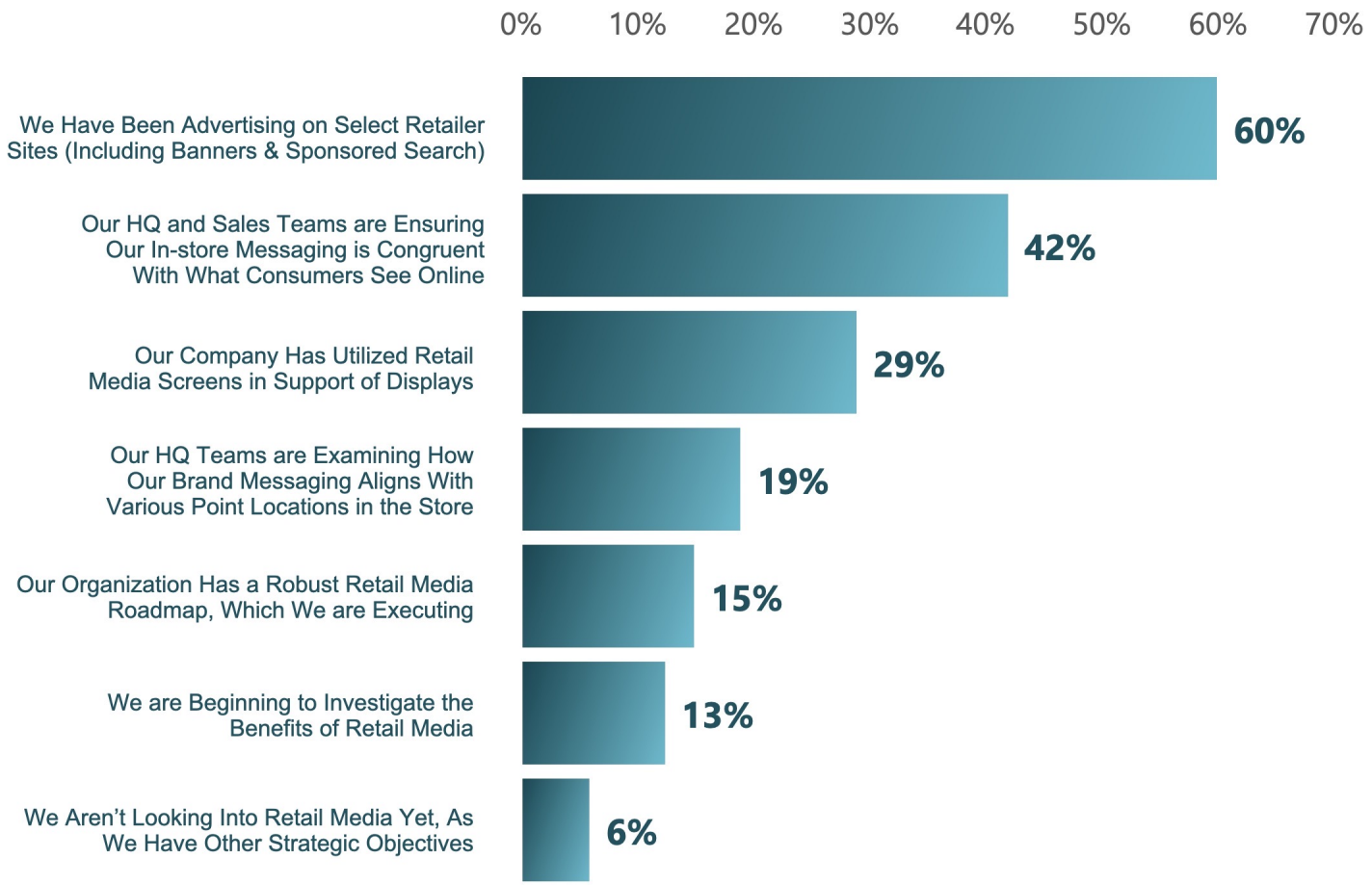
Retailer Expectations Are Accelerating Retail Media Adoption

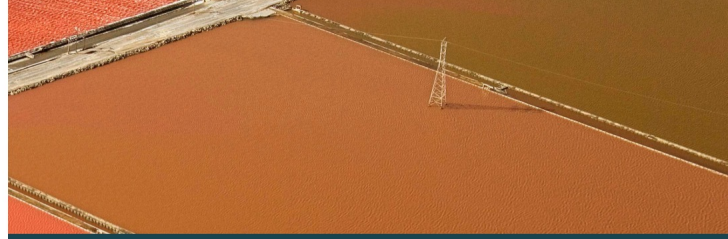
What factors influence your company's focus on retail media? (Please select all that apply)



Retail Media Adoption Levels Vary Widely Across CPGs.

How is your company navigating the new, complex, and transformative retail media landscape?





Leadership Priorities:

Honestly assess where your organization sits on the **retail media maturity curve.**

Move beyond pilots and fragmented experiments toward a **clear retail media strategy and roadmap.**

Retail Media Is Expanding Across Digital and Physical Touchpoints:

Ensure **brand and promotional consistency** across online and in-store media.

Ensure consistent shopper messaging across the headquarters, sales, and digital teams.

Leverage retail media to **amplify displays and in-store execution.**

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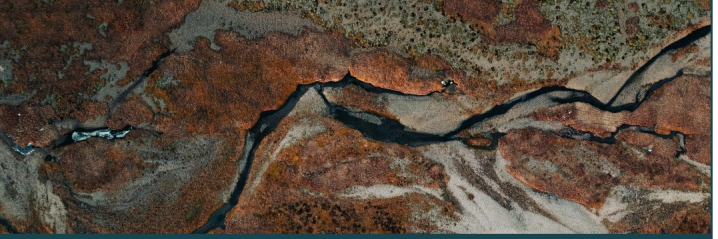

Leadership Priorities:

Establish **clear definitions of success** and incrementality.

Combine data: MMM, test-and-learn, and activation data.

Avoid over-reliance on retailer-reported metrics alone.

Retail Media Complexity Is Slowing Scaled Execution:

Simplify decision-making across multiple RMNs and platforms.

Prioritize platforms that align with strategic retailers and shoppers.

Build governance to manage rules, bidding, and execution complexity.

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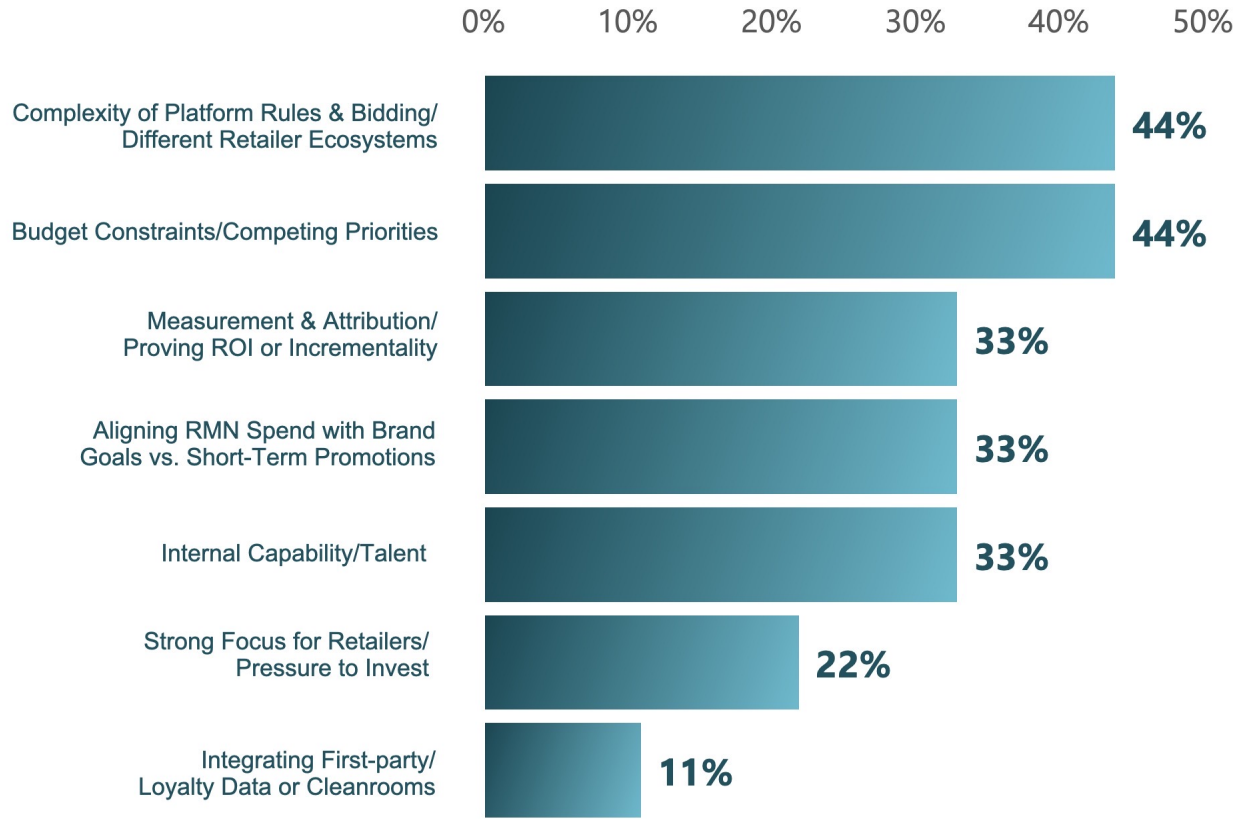
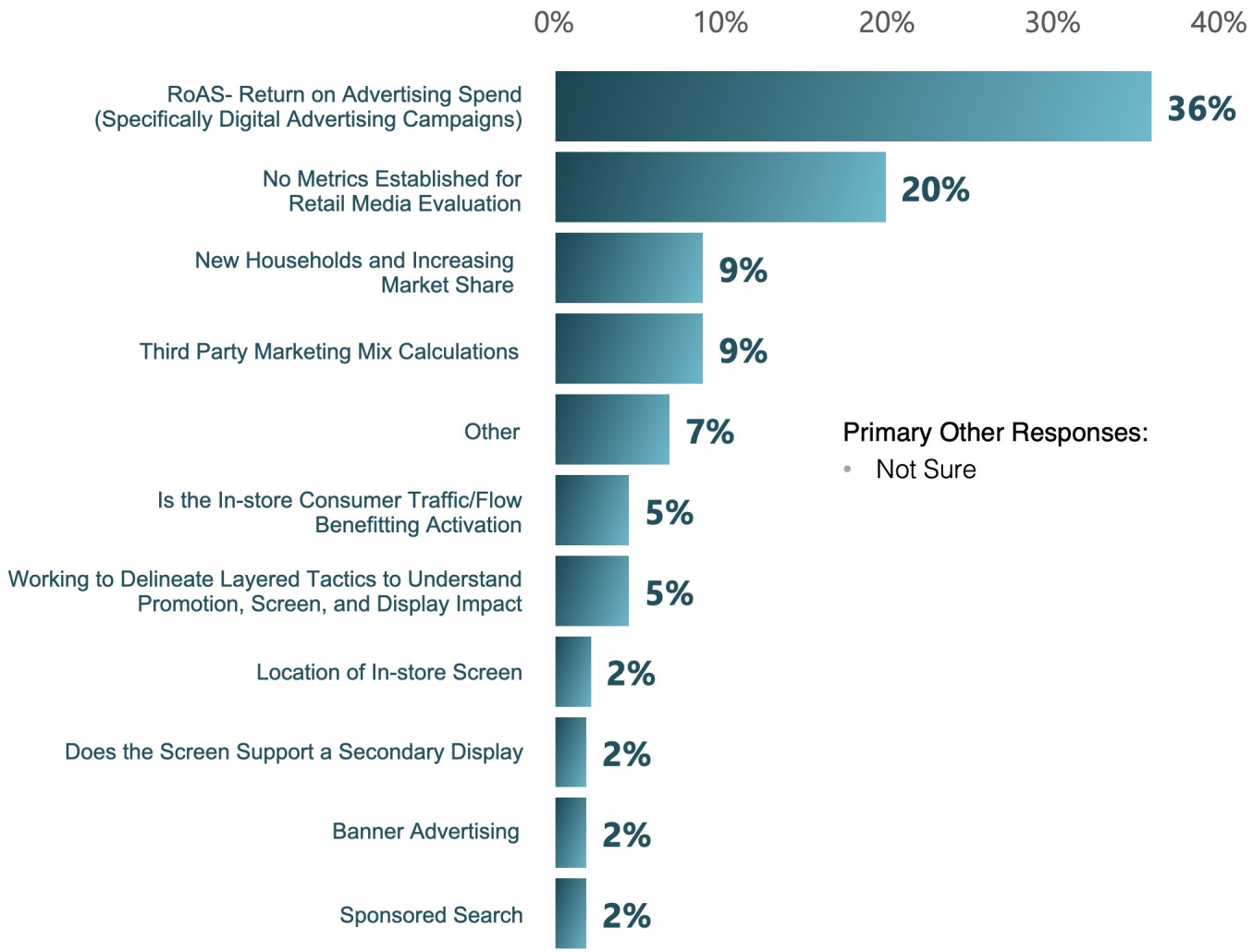
Measurement and Attribution Remain the Biggest Retail Media Challenge

What are your three biggest challenges with Retail Media Networks (RMNs)?



Retail Media Metrics Are Still Inconsistent and Fragmented

What key metrics does your organization use to quantify the impact of in-store retail media activations? (Select all that apply)



Primary Other Responses:

- Not Sure



Leadership Priorities:

Standardize metrics across screens, banners, search, and displays.

Ensure alignment with emerging industry frameworks.

Measure beyond ROAS to include household growth and market share.

Retail Media Requires Cross-Functional Ownership:

Make retail media a **shared responsibility** across sales, marketing, and digital.

Align incentives and KPIs across functions.

Prevent siloed capabilities, and ensure retail media planning and evaluation isn't done in isolation.

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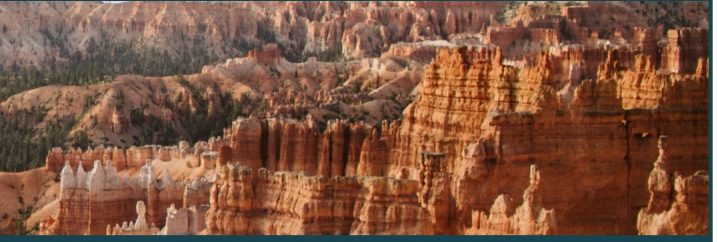


Leadership Priorities:

Define how deeply to partner with key retailers and RMNs.

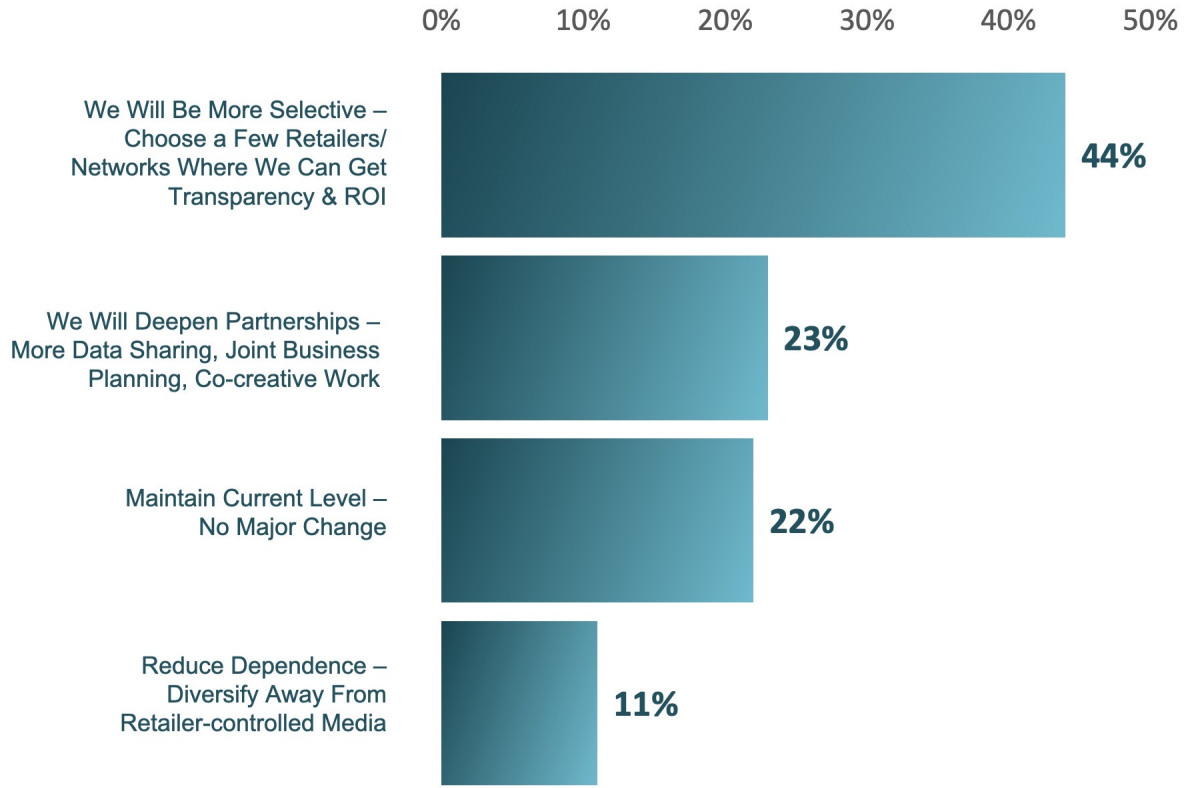
Explore data sharing, clean rooms, and joint measurement.

Shift from transactional buying to **strategic collaboration.**

Incorporate into your Joint Customer Business Planning.

Retail Media Partnerships Will Shape Future Growth

Which statement best reflects your view of partnerships with Retailer Media Networks in the coming years?



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Leadership Priorities:

Acknowledge that **AI adoption** in retail media is still **early, but accelerating**.

Prepare for AI to manage complexity, speed, and scale across RMNs.

Invest in AI for activation, optimization, and measurable impact, not just experimentation.

Assess **how key retailers are embedding AI** into their media platforms.

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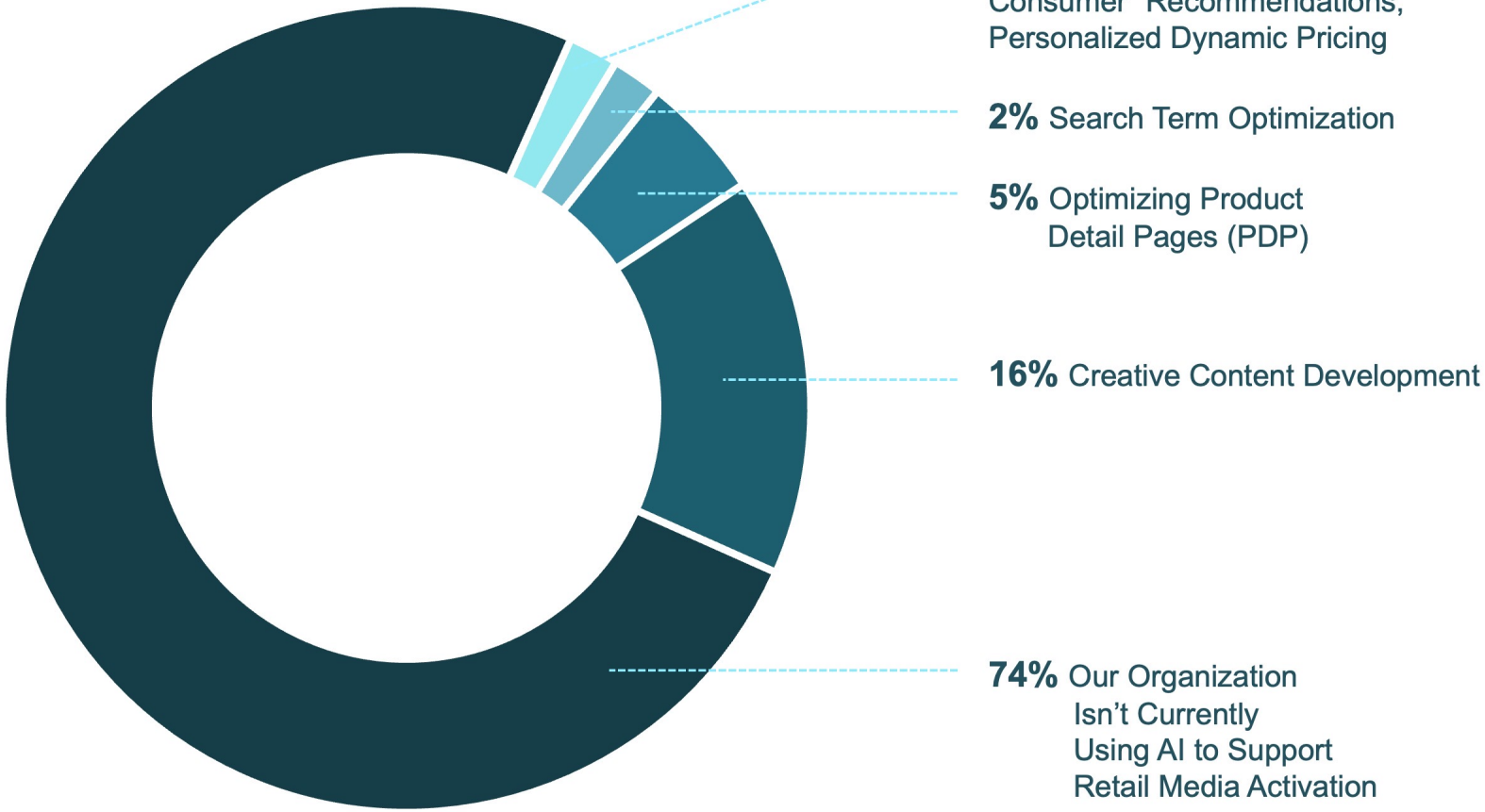
How is your organization using AI to support your Retail Media activation? (Select all that apply)





Leadership Priorities:

Start with **high-impact use cases**: creative optimization, budget allocation, shopper prediction, and personalization.

Design campaigns to perform across AI-driven search, targeting, and personalization. Target consumers and AI/LLM models for the greatest impact.

Prepare teams to plan for both consumers and AI-driven discovery.

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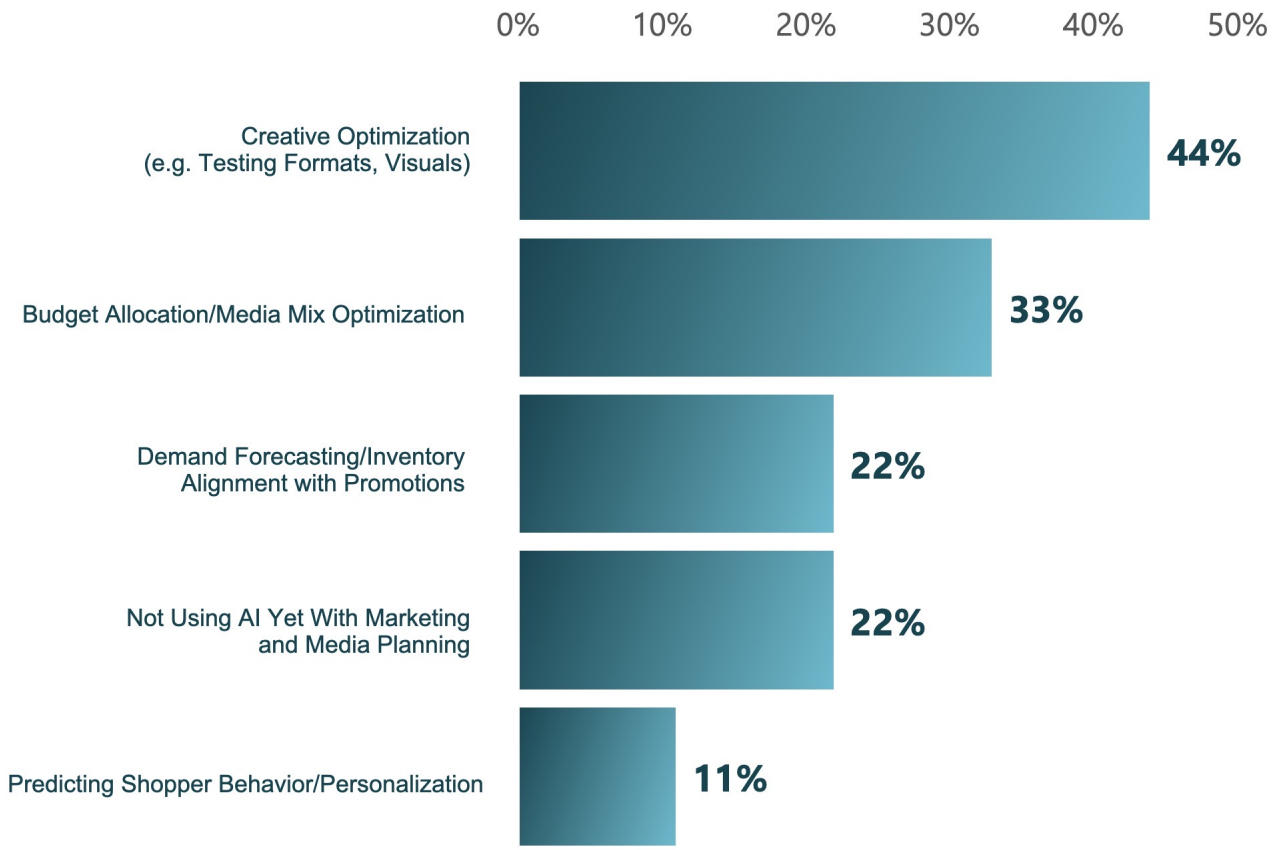
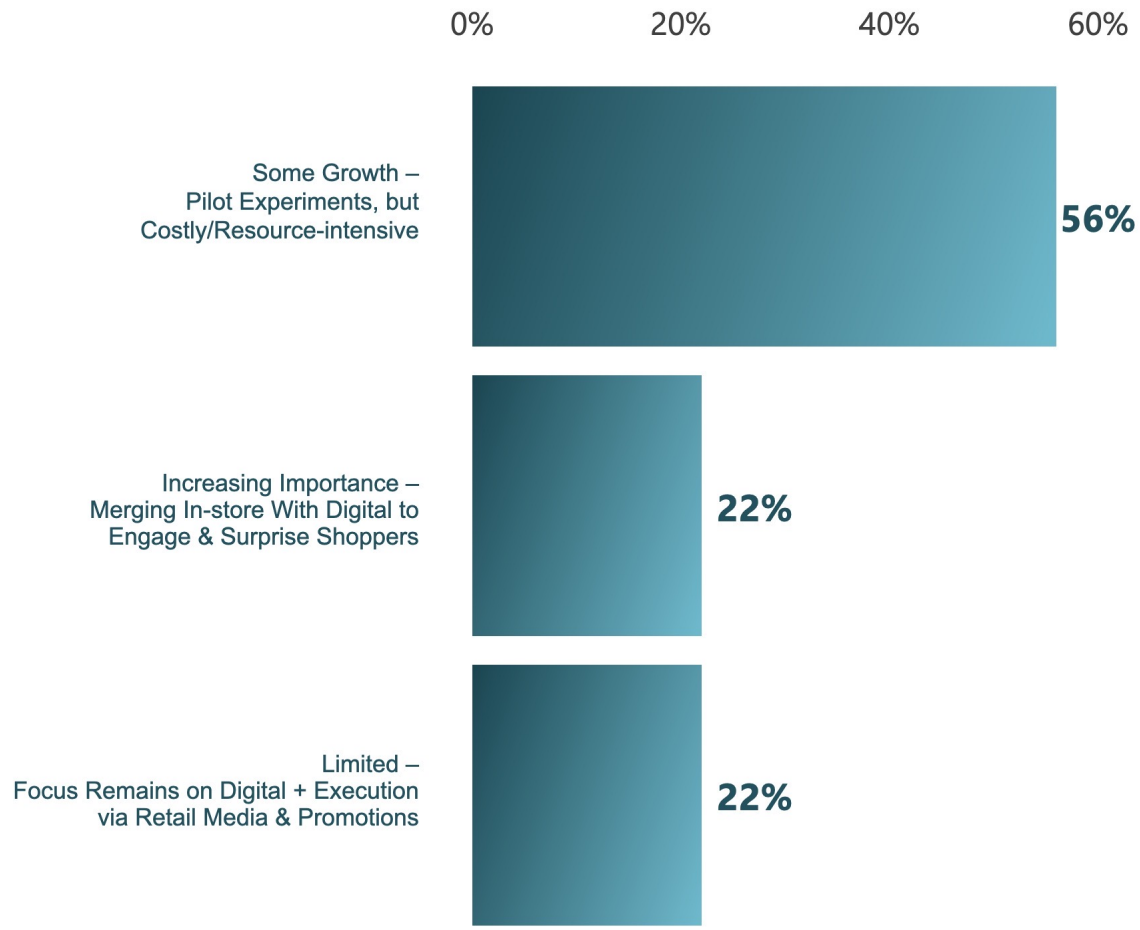
Most CPGs Are Just Starting To Leverage AI Across Media and Marketing.

How are you using AI/machine learning in your marketing and media planning? (Select all that apply)



AI Will Redefine Shopper Engagement Across Physical and Digital Experiences

What role do you expect “experiential” physical + digital shopper marketing to play?





Leadership Priorities:

Treat physical + digital shopper engagement as a **connected experience.**

Align retail media, displays, and experiential tactics to reinforce a consistent message.

Test experiential investments with **clear performance objectives.**

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Technology Foundations Will Determine Enterprise & Marketing Effectiveness

Prioritize enterprise systems that enable data connectivity, prescriptive optimization, and decision velocity.

Ensure marketing systems support retail media execution, data integration, and AI activation.

Work collaboratively with cross-functional enterprise planning teams (RGM, TPMx, RetX) to ensure that marketing technology investments and analyses are clearly understood and effectively incorporated into parallel workstreams and decision-making processes.

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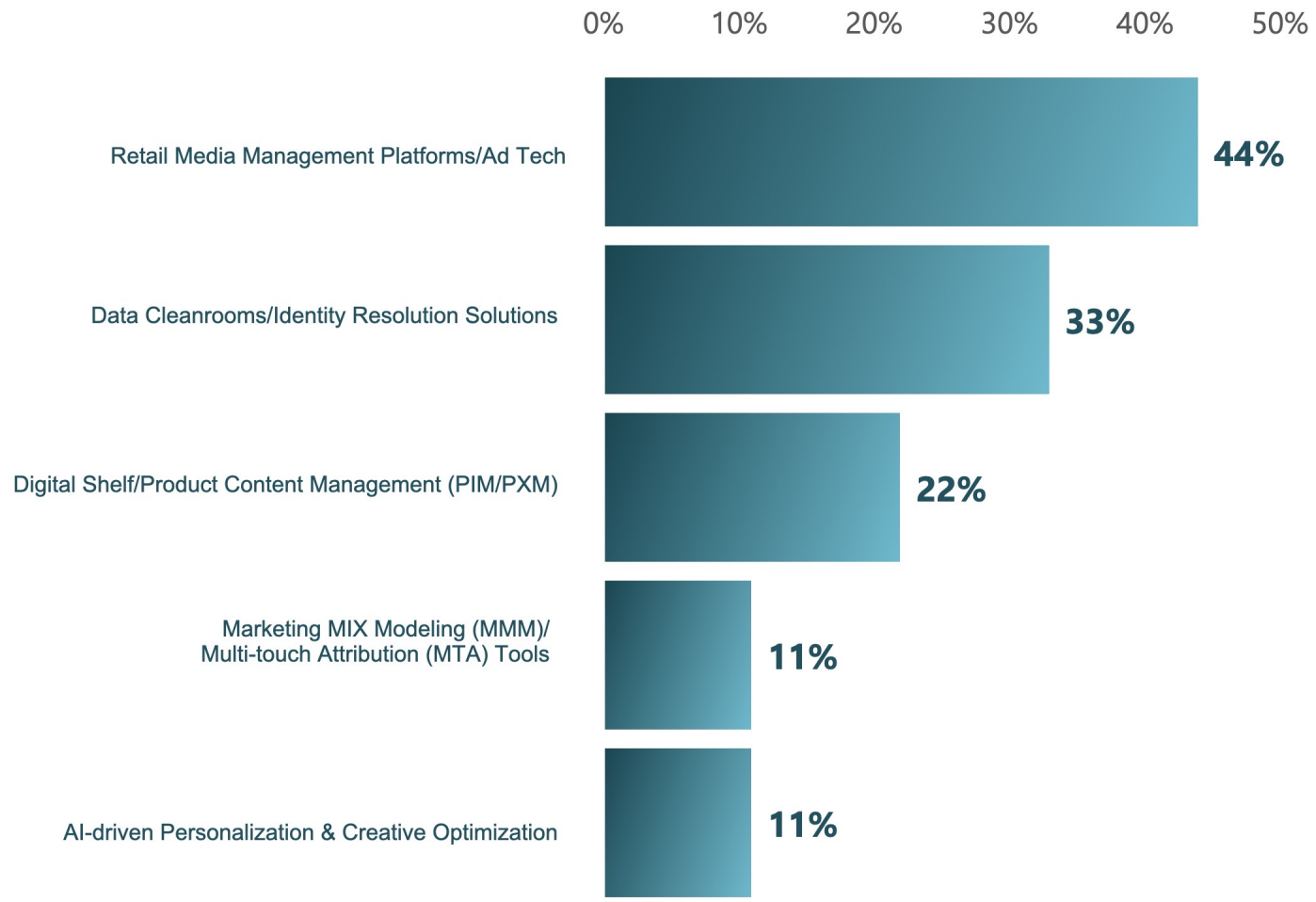
Which technologies is your organization investing in for 2026 to address current marketing challenges? (Select all that apply)



Foodservice

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Foodservice Trends:

In 2026, inflation is expected to stabilize, prompting foodservice operators to focus on experiences that make dining out feel worthwhile. Interactive dining, simplified menus, and elevated basics are likely to attract consumers seeking value, engagement, and a sense of comfort. Nostalgic classics, heritage-inspired dishes, bold flavors, and texture-forward foods are anticipated to be key drivers of guest satisfaction.

Sustainability and wellness are expected to continue shaping menus. Clean-label foods, ancestral ingredients such as beef tallow, and functional nutrition, including fiber and protein, are predicted to gain popularity as consumers seek gut health, satiety, and mindful indulgence. Freezer-friendly, high-quality prepared foods may also see increased adoption for their convenience and reduced waste.

Technology and innovation are anticipated to play a larger role in foodservice operations. Digital tools may streamline service, enable personalization, and support experimentation with new formats, helping operators remain agile as consumer preferences continue to evolve.



Global Flavors and International Snacking

Increased exploration of international cuisines, particularly through snackable options that introduce global flavors. delish Food Trends 2026 Better Homes & Garden



Focus on Fiber

Consumers are seeking foods higher in fiber to support gut health, overall digestive wellness, and natural ways to feel fuller for longer. Whole Foods Market 2026 Trends



Unique Flavor Combinations

Consumers are embracing bold flavors and unexpected combinations year-round. Unusual brand collaborations, like Campbell's and Pabst Blue Ribbon on beer-flavored soups, capture attention, drive trial, and can re-engage lapsed consumers.
Better Homes & Garden Food Dive 2026



Functional and Health-Focused Foods

Consumers increasingly seek foods and beverages with functional benefits, such as hydration-focused drinks, high-protein meals, and gut-supporting options. Growing demand for healthier and more sustainable choices fuels plant-based meat and dairy alternatives, while real, recognizable ingredients remain key to consumer trust. Whole Foods Market 2026 Trends Food Dive 2026

See sources on page 199.

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Anticipated 2026 Foodservice Trends:



Sustainability and Eco-Conscious Practices

Restaurants will focus on locally sourced ingredients, eco-friendly packaging, and waste reduction to meet growing consumer demand for sustainable practices. National Restaurant Association 2026



Unforgettable Texture: Crunch and Beyond

The focus on textures like crunch is gaining popularity, enhancing the sensory experience of meals and snacks.
Better Homes & Gardens



Protein Innovation

A focus on diverse protein sources, including plant-based, cultivated, and alternative proteins, is expected to grow as brands anticipate rising demand for sustainability and higher protein options.
Webstaurant Store 2026 Trends



Freezer Fine Dining

Pairing high-quality ingredients with globally inspired flavors and time-saving solutions reflects consumers' desire for simplicity and a shift away from overcomplicated offerings.
Whole Foods Market Forecast delish Food Trends 2026



Middle Eastern and Regional Cuisine Exploration

As health-conscious eating continues to rise, flavors and dishes inspired by the Mediterranean diet and Middle Eastern cuisines are expected to gain popularity. Consumers are increasingly drawn to foods that tell a story, blending wellness, tradition, and authentic global flavors.
Webstaurant Store 2026 Trends delish Food Trends 2026



Interactive Dining

Offering dining experiences that feature interactive elements to justify the cost. delish Food Trends 2026



Technology Integration/Digitalization

Foodservice technology is redefining the industry, bringing both exciting advancements and new challenges. AI is transforming operations from menu creation to marketing, while robots and made-to-order bistro vending machines are helping address staffing needs and create new market opportunities. At the same time, increased digital integration highlights the importance of cybersecurity as operators adopt more connected systems.
Webstaurant Store 2026 Trends

These trends highlight a focus on innovation, sustainability, simplicity, and wellness-driven indulgence to meet evolving consumer expectations in the Foodservice Industry.

See sources on page 199.

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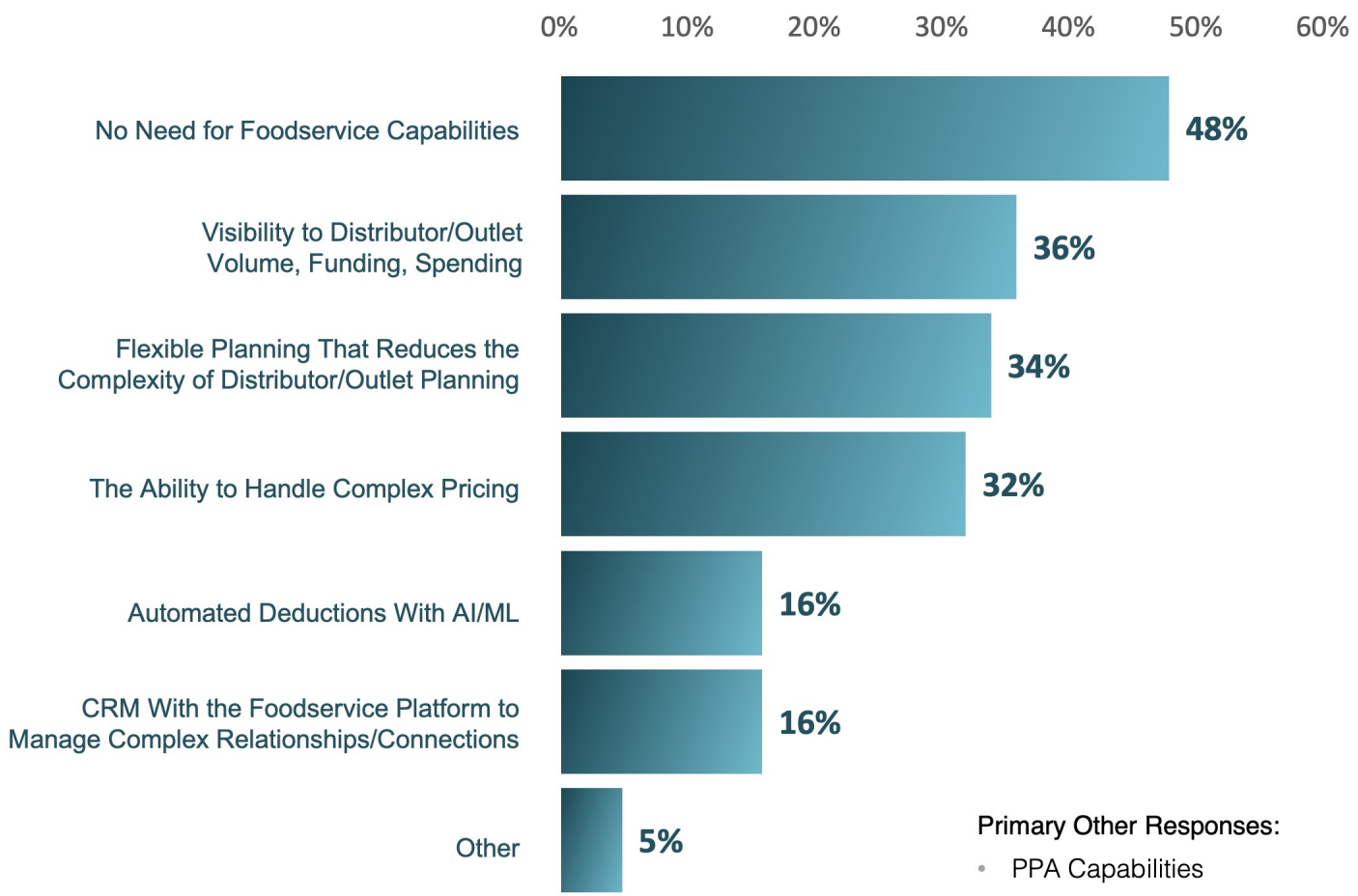
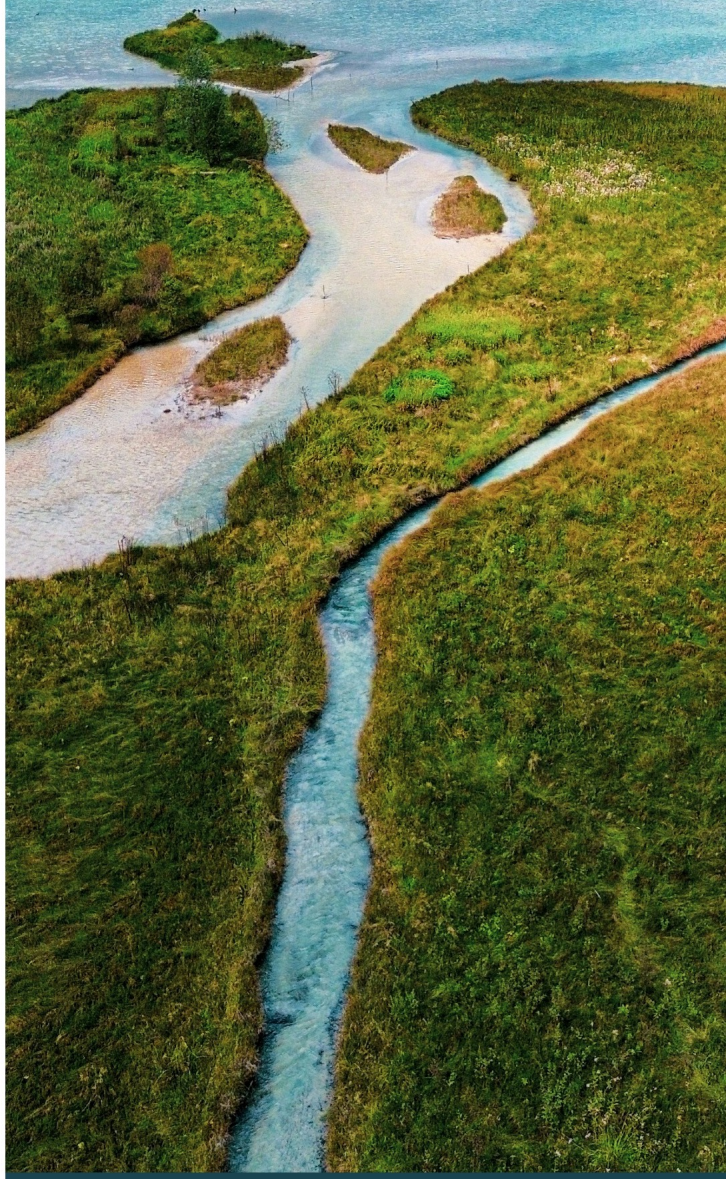
When searching for new Foodservice capabilities, which of the following do you look for? (Select all that apply)



Primary Other Responses:

- PPA Capabilities



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Ecommerce

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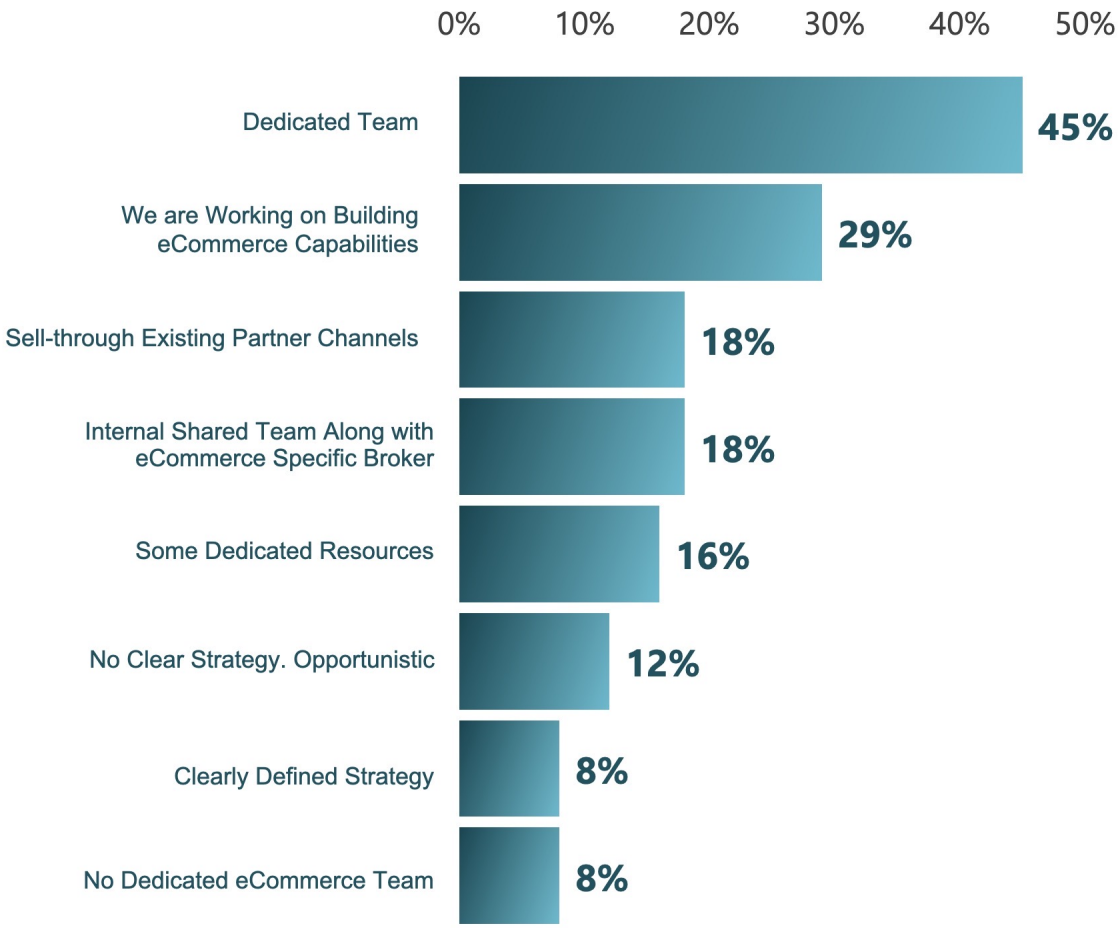
Ecommerce Growth Is Outpacing Organizational Readiness

How would you describe your current eCommerce capabilities? (Select all that apply)





CGP eCommerce Growth ≠ scaling of resources
Increased Growth ≠ Increased profitability

Speed to market without a clearly defined strategy risks brand positioning and profit margin

Profitability requires holistic enterprise decisions, not channel-specific go-to-market strategies & tactics

Establish a disciplined approach to managing the digital shelf as a fundamental execution pillar

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POI Share groups relay that eCommerce challenges arise with:

- Disparate and accurate retailer data
- Inconsistent content, pricing, and promotions
- Limited visibility to:
  Consumer buying behavior→ conversion rates (& drivers)→ profitability
- What KPI's to use to measure success

Data Priorities for the Next 12 Months

- Integrate eCommerce into TPMx, RGM, and IBP—not parallel to them
- Standardize eCommerce KPIs across retailers
- Transition from separate eCommerce and TPM reporting to comprehensive, prescriptive Holistic Enterprise insights

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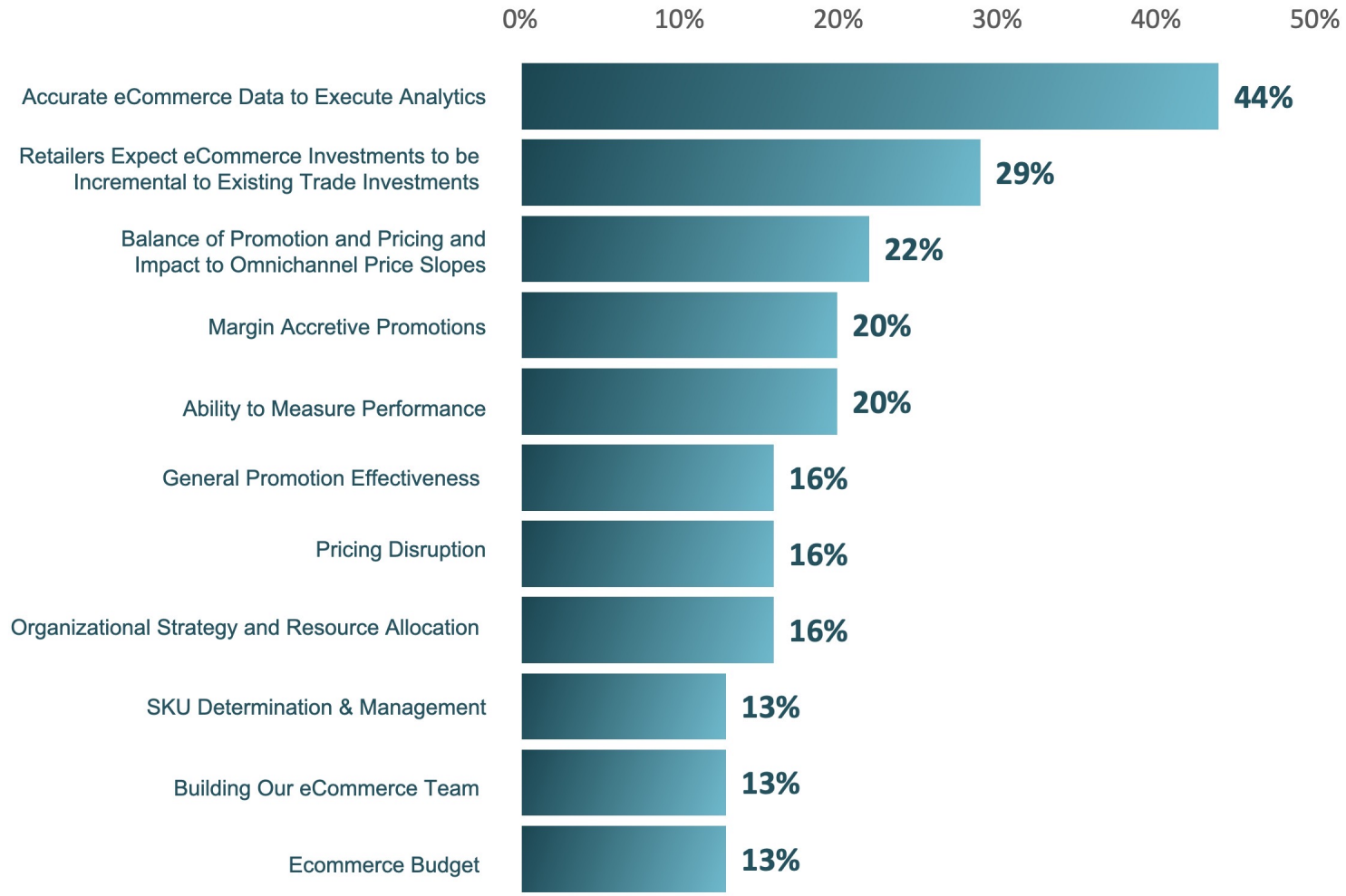
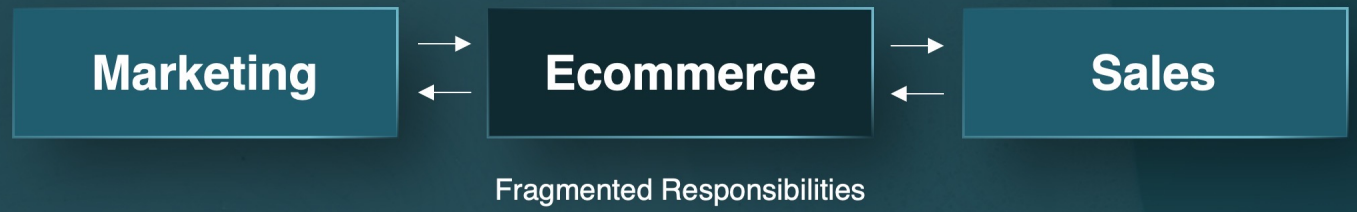
Forty-four percent of respondents continue to face challenges in obtaining accurate eCommerce data for effective analytics.

What have been your top eCommerce challenges? (Select all that apply)



The Structural Issue: eCommerce Activates Through Marketing & Sales

Managing eCommerce planning, measurement, and reporting can be challenging due to the involvement of numerous internal planning and execution partners.



CPG eCommerce success with consumers and Retailers will be determined by how quickly leaders define strategy & budgets, establish ownership, allocate resources, integrate data & reporting, align incentives, and govern across the holistic enterprise.

Leadership Action:

- Clearly define the organization's operating model, strategy, budgets, and data integration
- Establish eCommerce ownership and cross-functional governance
  - Elevate eCommerce to an enterprise growth capability, not a sub-team
  - Gain cross-functional alignment around demand, pricing, promotions, and content decisions
- Incorporate eCommerce planning opportunities into the optimized Holistic Enterprise Plan (RGM +TPMx)
- Align Marketing, Sales, and Revenue Growth Management incentives

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Integrated Business Planning (IBP)

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From Cross-Functional Process to Growth & Investment Conviction

Integrated Business Planning (IBP) is widely adopted across the CPG industry, yet few manufacturers are realizing its full value. While many organizations report having an IBP process in place, most struggle to translate that process into reliable forecasts, confident investment decisions, resilience, or sustained growth.

At its core, IBP is designed to connect enterprise strategy with sales, financial, and operational plans, aligning the organization around a single, executable view of the business.

When implemented effectively, IBP becomes a powerful mechanism for navigating uncertainty, balancing trade-offs, and driving profitable growth. When implemented poorly, it becomes a heavy, manual exercise focused on reconciliation rather than decision-making.



Integrating people, processes, and capabilities

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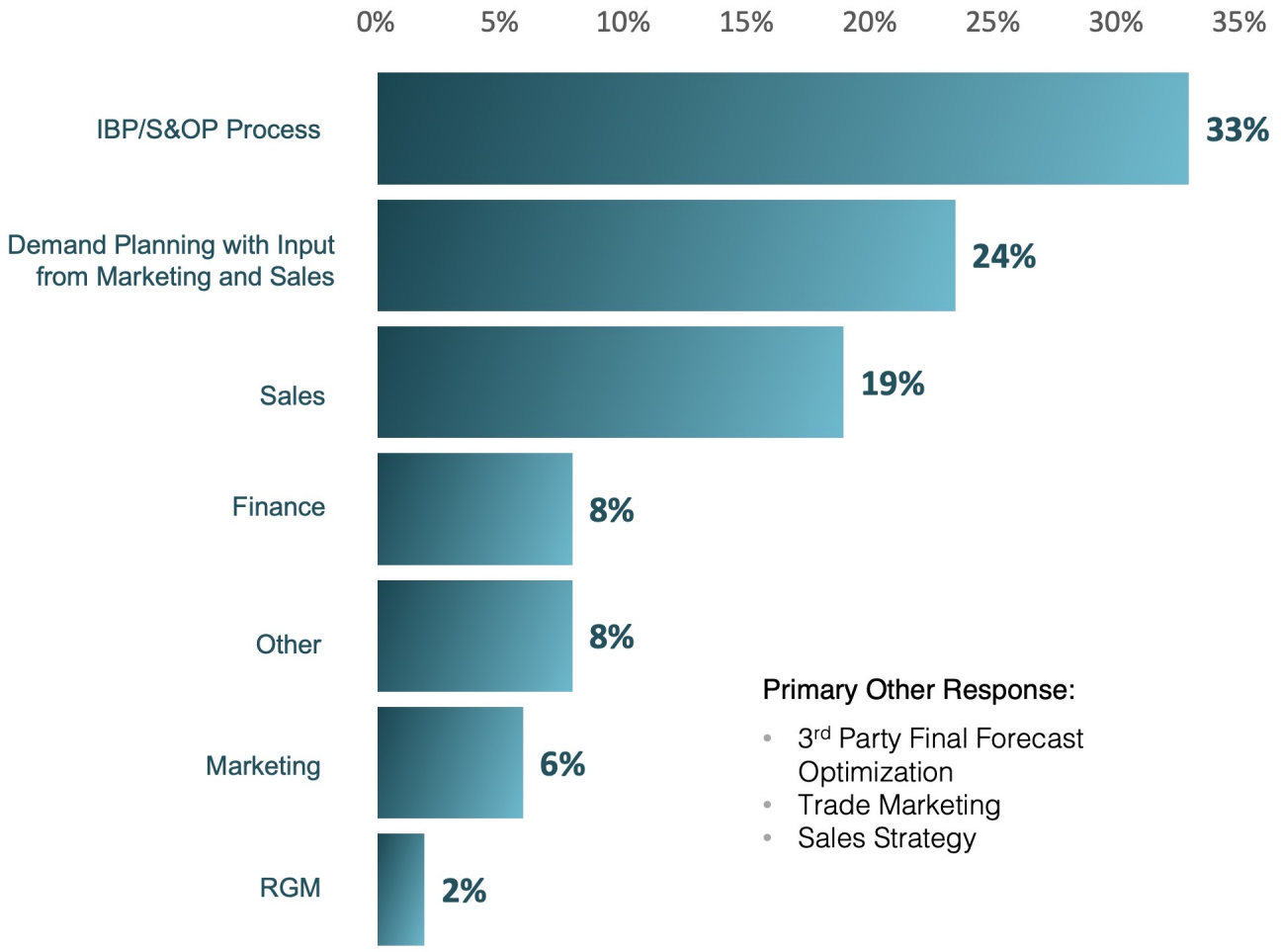
Which department owns the final volume forecast? Please note ownership vs. noting the multiple teams who provide inputs into the forecast.



Primary Other Response:

- 3rd Party Final Forecast Optimization
- Trade Marketing
- Sales Strategy

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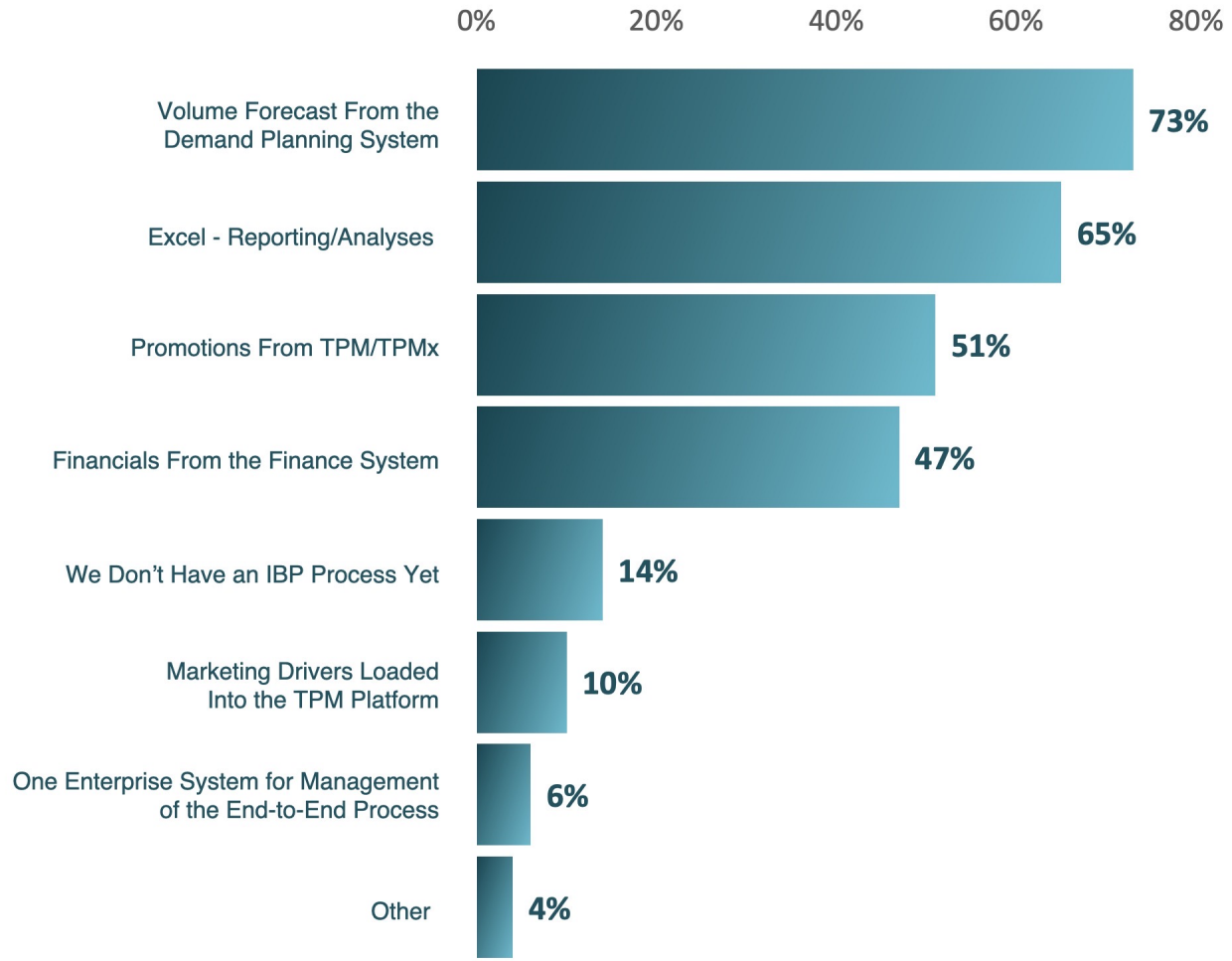
What sources of data input are being used for integrated business planning (IBP)? (Select all that apply)



For many manufacturers, the IBP process often relies on numerous disparate sources of information, creating inefficiencies and silos within the organization. This presents a significant opportunity to streamline data sources, integrate systems, and automate key workstreams. By centralizing and harmonizing enterprise planning inputs, manufacturers can enhance the IBP process, ensuring it delivers richer cross-functional insights and a clearer understanding of the drivers impacting organizational performance.

Moreover, many of the data inputs traditionally used in IBP are grounded in backward-looking historical analyses. While historical data remains valuable, it is increasingly insufficient in addressing today's rapidly changing consumer behaviors and market dynamics. With shifts in consumer preferences, omnichannel shopping patterns, and new competitive pressures, relying solely on historical trends fails to provide a reliable forecast of future consumption.

To stay ahead, organizations must pivot toward incorporating forward-looking data sources, such as real-time marketing analytics, consumer sentiment, and behavioral drivers. These insights allow businesses to anticipate and adapt to evolving demand patterns, align promotional and supply chain strategies more effectively, and make IBP more predictive and agile. Emphasizing forward-looking data ensures that IBP becomes not just a planning process but a strategic advantage for delivering resilience, fostering growth, and building investment conviction.

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Why IBP Rarely Delivers Impacting Value

Based on POI Community interactions and share groups.

Integrated Business Planning Breaks Down in Practice

1. Disconnected & Low-Quality Inputs

- Too many disparate data sources
- Backward-looking, historical bias
- Inconsistent assumptions by function
- Fragmented across systems

IBP is an exercise of debating inputs, not improving outcomes.

2. Ownership Issues & Misaligned Incentives

- Sales, Marketing, Finance, and Supply Chain develop their numbers based on differing data sources & protect their numbers
- Forecast ownership is unclear
- Business Unit incentives are not aligned

IBP meetings devolve into negotiations rather than decisions grounded in aligned facts.

3. Heavy Process; Weak Decisioning

- Manual scenario modeling across disparate BU's
- Limited in-flight visibility
- No closed-loop learning

The IBP process exists, but it's manual and disconnected vs. automated, dynamic, and ongoing.

As a result, IBP frequently fails to deliver the forecast accuracy, agility, and confidence required to drive meaningful revenue and growth outcomes.

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Having an IBP Process ≠ Achieving IBP Value

Based on POI Community interactions and share groups.

IBP Adoption is High, Yet IBP Effectiveness is Not

Manufacturers Report They Have:

- An IBP process
- Monthly reconciliation & quarterly consensus meetings
- Cross-functional attendance
- Scenario planning is manual and slow
- There is limited connectivity to RGM, TPMx, or Retail Execution
- Debate about whose number is right
- Volume forecast sign-off



The Reported Most Common CPG Result:

- Forecast accuracy remains volatile
- Growth investments lack conviction
- No confidence to invest against the plan

IBP without connected enterprise planning, shared data, process ownership, and decision rights becomes a BU analysis and reporting exercise – not a growth engine.

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What it Takes to Move IBP from Process to Performance

1. **Establish a Single, Trusted Enterprise Planning Backbone:**
   - Harmonized demand, financial, and commercial data
   - Automated insights
   - Forward-looking signals and insights (market dynamics, consumer, pricing, and promotion)
   - Incorporate RGM, TPMx, and Retail Execution inputs

2. **Decide Forecast Ownership & Decision Rights:**
   - One accountable total forecast owner
   - Steering committee and clear escalation paths
   - Align incentives across Business Units

3. **Evolve From Static Planning to Ongoing, Dynamic, Holistic Enterprise Planning™ & Decisioning:**
   - Optimized scenario planning
   - In-flight monitoring
   - Closed-loop insights and learning



When powered by connected data, shared accountability, and cross-functional decision-making, IBP enables resilience, fuels growth, and builds investment conviction.

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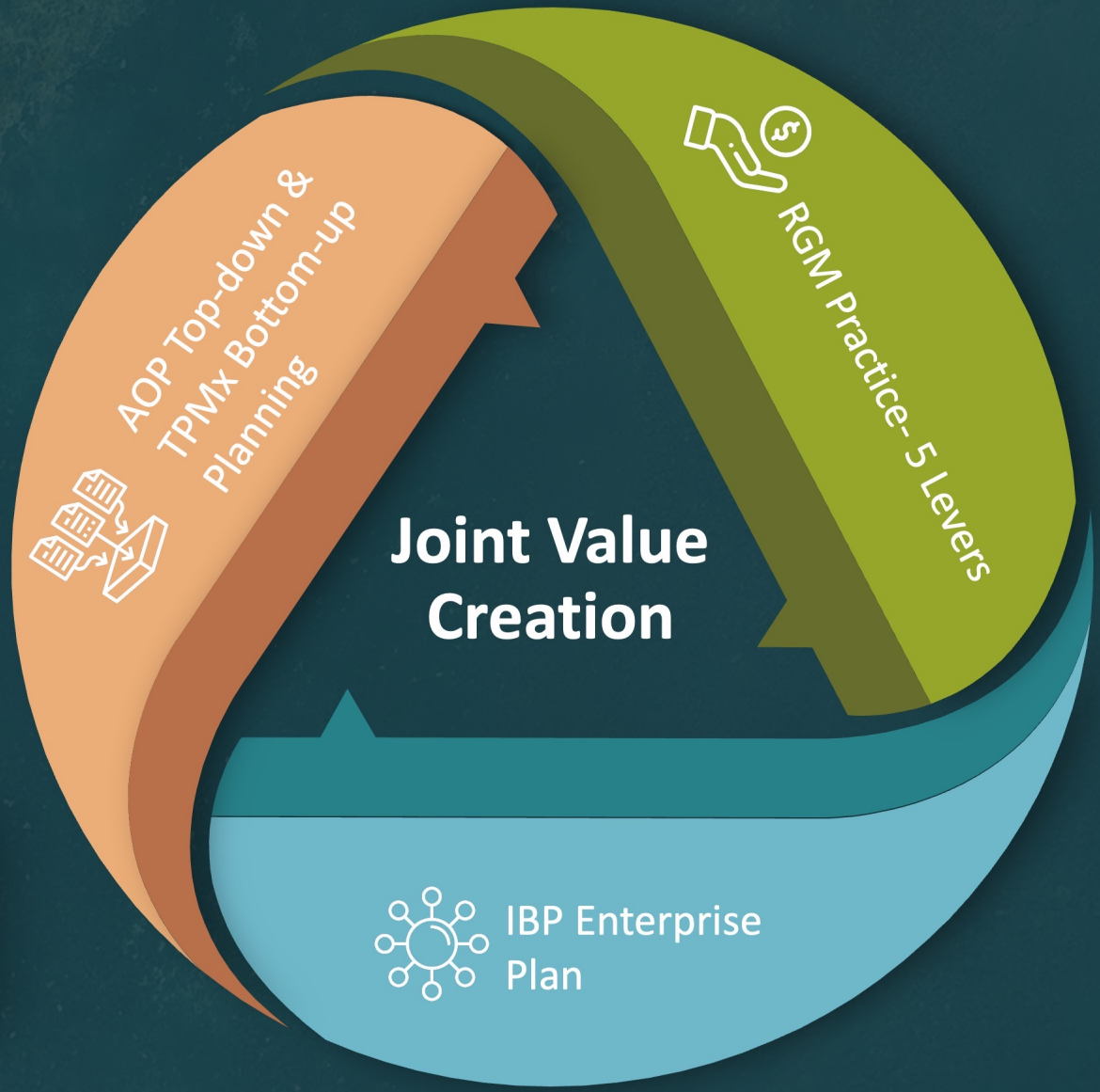
Top-down/Bottom-up Planning, RGM, and IBP Deliver:

- Automated & Connected Commercial Planning
- Efficient Growth & Profitable Business Impact
- A Competitive Advantage & Strategic Differentiator

Holistic Enterprise Planning™ + IBP = Joint Value Creation



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Retail Execution

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Retail Execution: Where Strategy, Investment, and the Consumer Converge

Retail Execution (RetX) involves the real-time activation of brand, pricing, promotion, assortment, and availability strategies across both physical and digital retail environments. It represents the critical moment when holistic enterprise planning™ decisions are either executed or undermined. Retail execution is the final and most consequential stage of value realization for CPG manufacturers.

Leading manufacturers are shifting from reactive execution reporting to proactive, in-flight execution management directly tied to financial performance.

As consumers shop seamlessly across channels, retail execution must guarantee consistency, availability, and relevance at the moment of purchase, supported by data, automation, and real-time decision-making.

Execution gaps, including out-of-stocks, compliance failures, and misaligned promotions, can erode up to 25% of planned revenue, transforming effective strategies into missed financial outcomes.

Manufacturers spend nine months of the year cross-functionally planning—If the promotions or pricing aren't executed at retail, the value is lost.



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Retail Execution Transformation: From Store-Focused Activity to Omnichannel Growth Engine

2026 Retail Execution Imperatives:



Omnichannel Continuity—
Consumers expect consistency in promotions, pricing, availability, and brand experience across in-store, online, and hybrid journeys.



Experience-Led Merchandising—
Combines customer experience with compliance, where visual merchandising, in-store media, and consumer engagement influence conversion beyond mere presence.



Contextual Personalization—
Is evolving to include shopper context, location, and behavior—moving from static planning to dynamic activation.



Technology-Enabled Responsiveness—
Real-time data, automation, image recognition, and interconnected enterprise systems are essential for in-flight monitoring and rapid correction of execution gaps as they arise.

Rising shopper expectations, advancing technology, and competitive intensity have transformed retail execution.

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Retail Execution in 2026 Is Defined by Intelligence, Responsiveness, and Accountability

Execution Capability Shifts Shaping 2026



Data-Driven Inventory, Availability, and Placement

Retailers and manufacturers are leveraging near-real-time data to improve on-shelf availability, execution quality, and shelf productivity.



Sustainability as a Fundamental Element of Execution

Execution now reflects brand values, with sustainability integrated into packaging, shelving, displays, and in-store programs.



Mobile-First Execution & Engagement

Mobile tools now support field execution, shopper engagement, loyalty activation, and in-aisle decision-making.



Frictionless Checkout & Fulfillment

Cashless payments, BOPIS, and in-store fulfillment are now execution requirements—not differentiators.



AI-Enabled Store & Field Analytics

Advanced analytics and AI are being used to detect execution gaps, prioritize actions, and optimize store-level decisions.

Retail execution has transformed into a data-driven, measurable, intelligent extension of holistic enterprise planning™. Ideally, performance is monitored in real-time and course corrected before value is lost.

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Top Retail Challenges » Opportunities

- Customers desire and use multichannel buying experiences
- Customers expect an easy, seamless, consistent, and frictionless omnichannel buying experience
- Customers are looking for a personalized and experiential shopping experience
- Consumers want meaningful product experiences and connections within thriving user communities

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Retail Execution Challenges Are Intensifying and Evolving

Retail execution in 2026 is no longer defined solely by cost and labor constraints. It is increasingly shaped by complexity, speed, and alignment across omnichannel, data, and execution realities.

Key Retail Execution Challenges Facing CPG Manufacturers:



Rising Operational & Execution Costs

- Higher costs to support increasingly complex in-store requirements
- More overlapping promotions, displays, and compliance expectations



Localized & Fragmented Retail Execution

- Execution standards vary by retailer, banner, format, and store cluster
- “One-size-fits-all” execution playbooks no longer work



Omnichannel & Retail Media Execution Gaps

- Digital demand creation outpaces in-store execution readiness
- Retail media ROI suffers when shelf, inventory, and displays fail



Labor Constraints & Execution Quality Risk

- Manufacturer and retailer labor shortages persist
- Shrinking retailer labor shifts execution burden to manufacturers



Speed from Signal to Action

- Execution data exists, but insights often arrive too late to intervene
- Growing need for real-time detection and prescriptive action



Data Trust, Governance & Adoption

- Increased reliance on image recognition, AI, and automation
- Field adoption depends on trust, transparency, and change management



Sustainability Expectations vs. Shelf Reality

- Sustainable packaging and materials introduce new execution challenges
- Tension between sustainability goals and shelf effectiveness

Retail execution excellence now requires faster insight-to-action cycles, localized execution strategies, and tighter alignment across TPMx, RGM, retail media, and field execution.

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Field Execution Remains a Constraint to Fully Realizing Holistic Enterprise Planning™ Investments

Manufacturers continue to invest heavily in holistic enterprise planning™ to drive growth, profitability, and efficiency. However, POI survey respondents consistently highlight last-mile in-store execution as a persistent challenge and a significant opportunity for improvement.

While **41%** of respondents somewhat agree that their field sales teams are effective at store execution, only **39%** express true confidence in execution capabilities, with just **5%** strongly agreeing.

At the same time,**15%** of respondents indicate dissatisfaction, underscoring execution variability across organizations. These findings reinforce a critical disconnect between planning and execution. As execution complexity increases, driven by omnichannel strategies, retail media, localized assortments, and labor constraints, field teams are being asked to do more with less. Often, they lack real-time insights or prescriptive guidance to act decisively at the shelf.

Bridging this gap requires more than incremental process improvements. Manufacturers must enable field teams with real-time visibility, AI-driven insights, and integrated execution workflows that connect TPMx, RGM, and retail execution at the point of sale. As brick-and-mortar environments continue to evolve, execution excellence at the shelf is becoming a primary differentiator, directly influencing retailer relationships, promotional ROI, and consumer experience.

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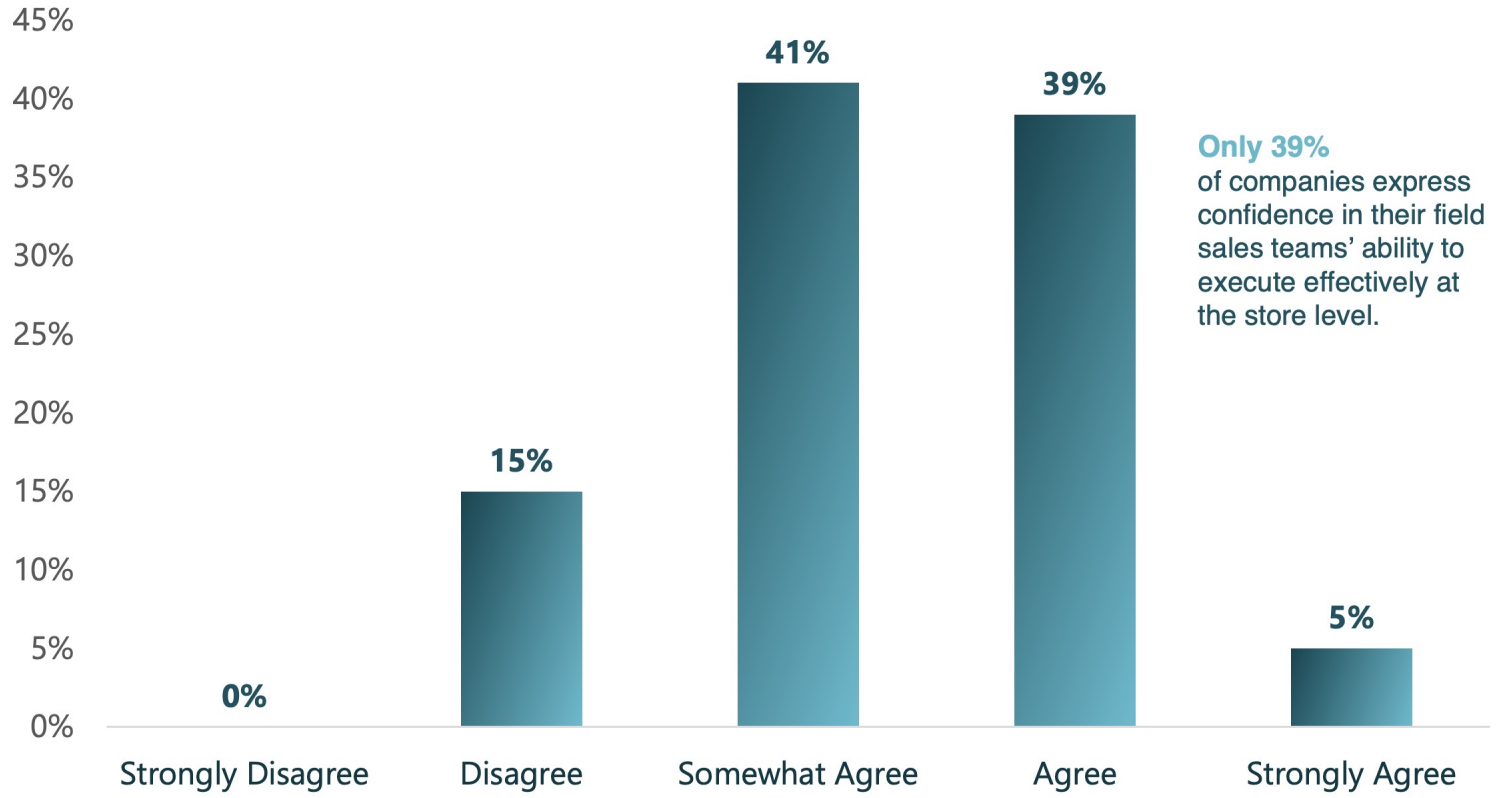
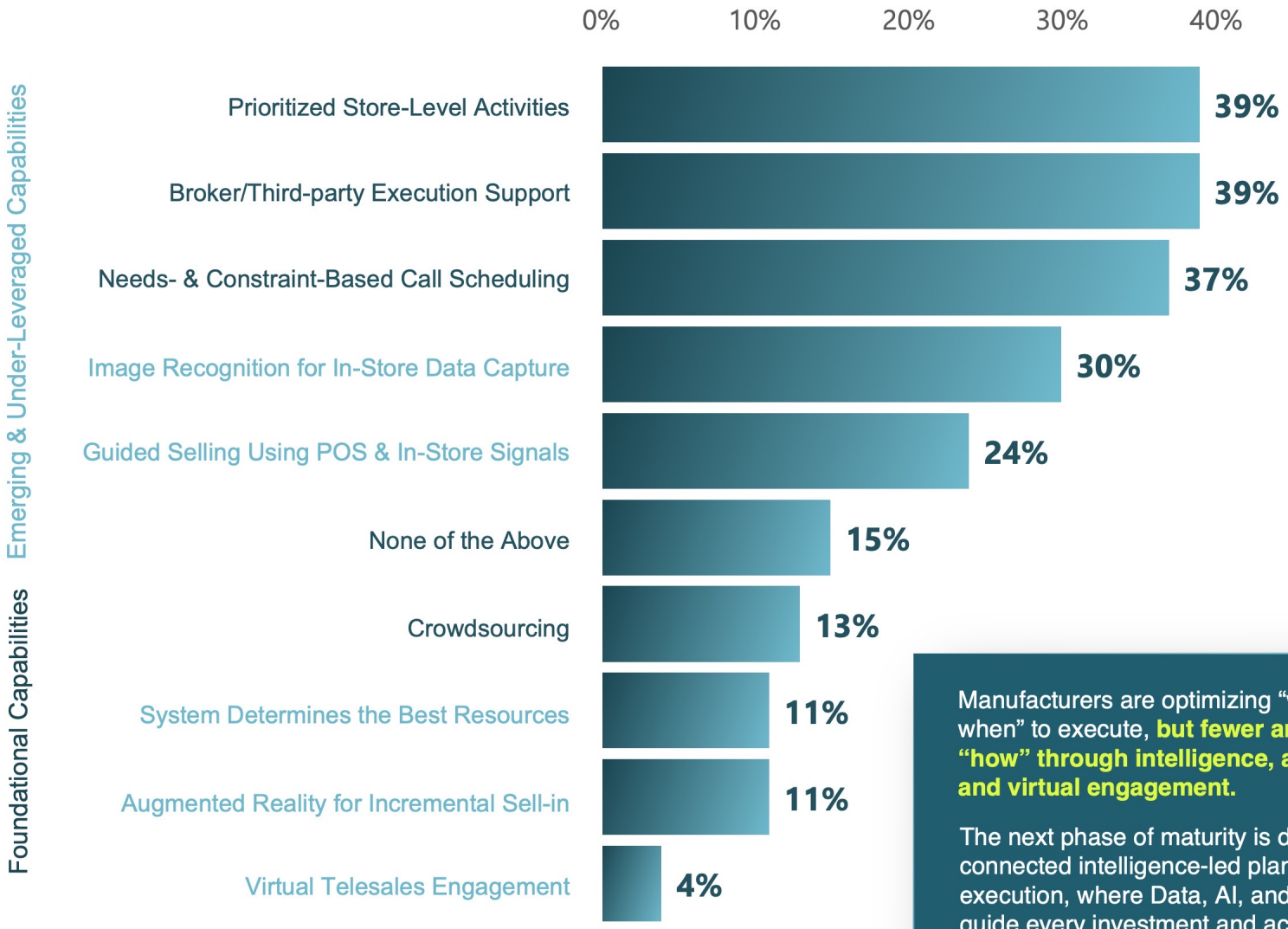
Your company is satisfied with the field sales' ability to execute at the store level…



Only 39% of companies express confidence in their field sales teams' ability to execute effectively at the store level.

Why it matters: Without strong store-level execution, investments in planning, pricing, promotions, and retail media cannot fully translate into consumer impact or financial returns.

Your organization has the following capabilities to gain efficiencies in Retail Execution: (Select all that apply)



Manufacturers are optimizing "where and when" to execute, **but fewer are optimizing "how" through intelligence, automation, and virtual engagement.**

The next phase of maturity is defined by connected intelligence-led planning and execution, where Data, AI, and automation guide every investment and action.

Retail Execution Efficiency Remains Tactical. Advanced, Intelligence-Led Capabilities Remain Under-Adopted

According to POI's survey, **39%** prioritize the sales representative's store activities, and **37%** of companies prioritize and schedule retail execution calls based on needs and constraints.

The survey reflects solid growth in the use of Image Recognition (IR), with **30%** of companies using Image Recognition (IR) technology. Implementing IR can significantly improve call efficiency and effectiveness. POI expects IR adoption to increase as manufacturers look to maximize execution results and call speed.

Twenty-three percent of organizations use guided selling to standardize sales processes and lead reps through a prescribed call process.

Currently, only **4%** of companies use virtual calls to reach untapped retailers and markets. There is untapped upside to virtually servicing outlying stores.

Furthermore, **15%** of companies surveyed reported having no in-store retail execution capabilities (RetX). This lack of RetX can hinder an organization's ability to achieve its goals and affect its growth.

Implementing RetX capabilities can help companies realize their plans and achieve resilience, growth, and conviction.

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This is an insight activation gap.

The number-one issue, cited by **53%** of respondents, is that data and insights are simply not being fully leveraged. And importantly, this is different from data availability. Many organizations have data, but they're not activating it at the point of execution.

- The challenge is **turning insights into action at the shelf**
- Execution teams need prioritized, contextual, real-time guidance

Partner alignment is now a competitive differentiator

- **36%** struggle with broker/distributor prioritization
- Execution excellence requires shared goals, shared insights, and shared accountability
- Fragmentation across partners directly impacts store-level outcomes

Technology exists—but adoption and integration lag

- Only **22%** cite missing technology
- Value is unlocked when tools are:
  - Embedded in workflows
  - Connected to RGM and planning
  - Designed for field usability

Retail execution issues are often downstream symptoms

- Lead-time and promotion challenges stem from:
  - Disconnected planning
  - Siloed trade, pricing, and supply decisions
- Execution exposes upstream misalignment

Exceptional execution requires orchestration

- Real-time data
- Cross-functional collaboration
- Automated, insight-driven workflows
- Continuous feedback loops between HQ and the field

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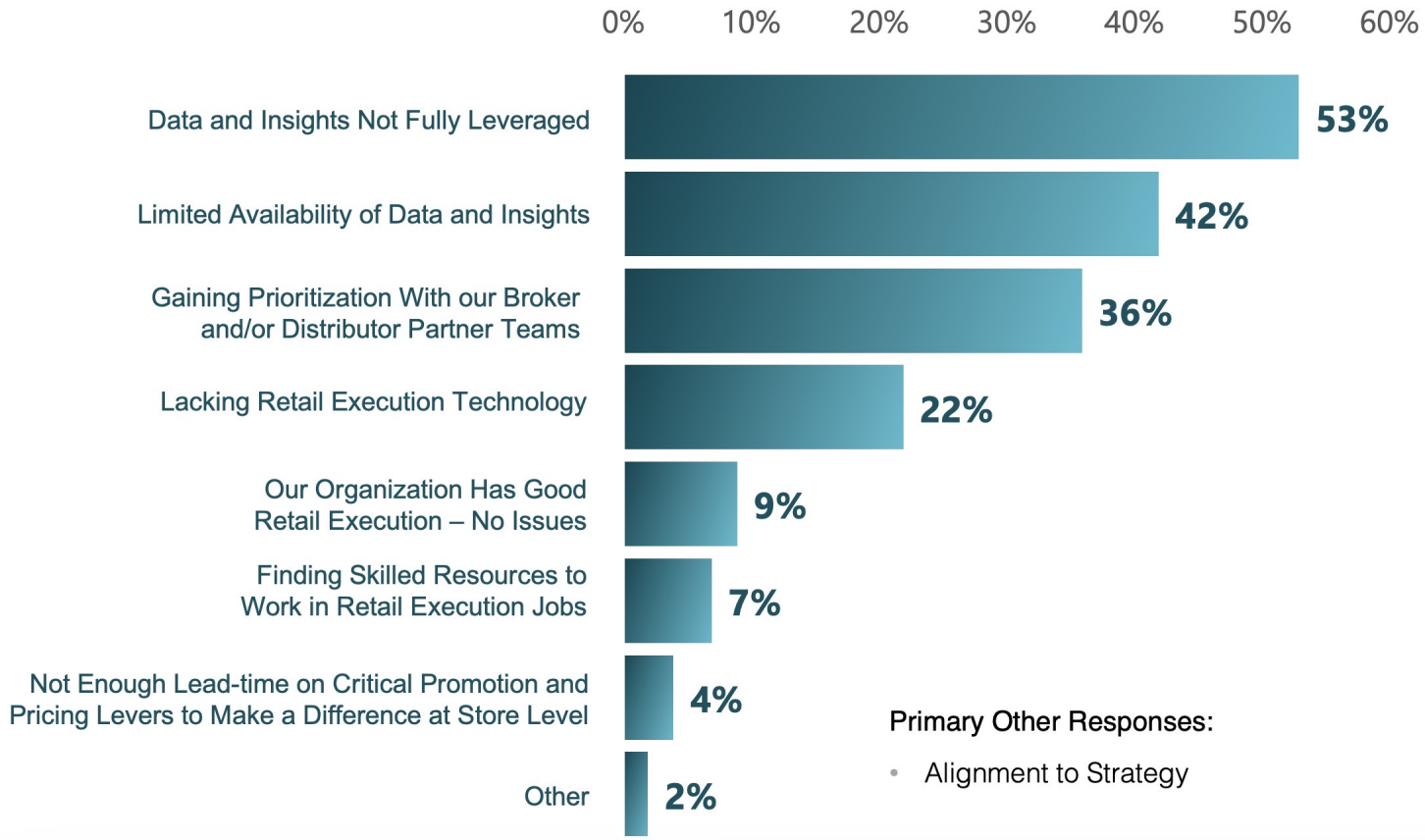
Top Issues Keeping Your Organization From Having Exceptional Retail Execution: (Select all that apply)



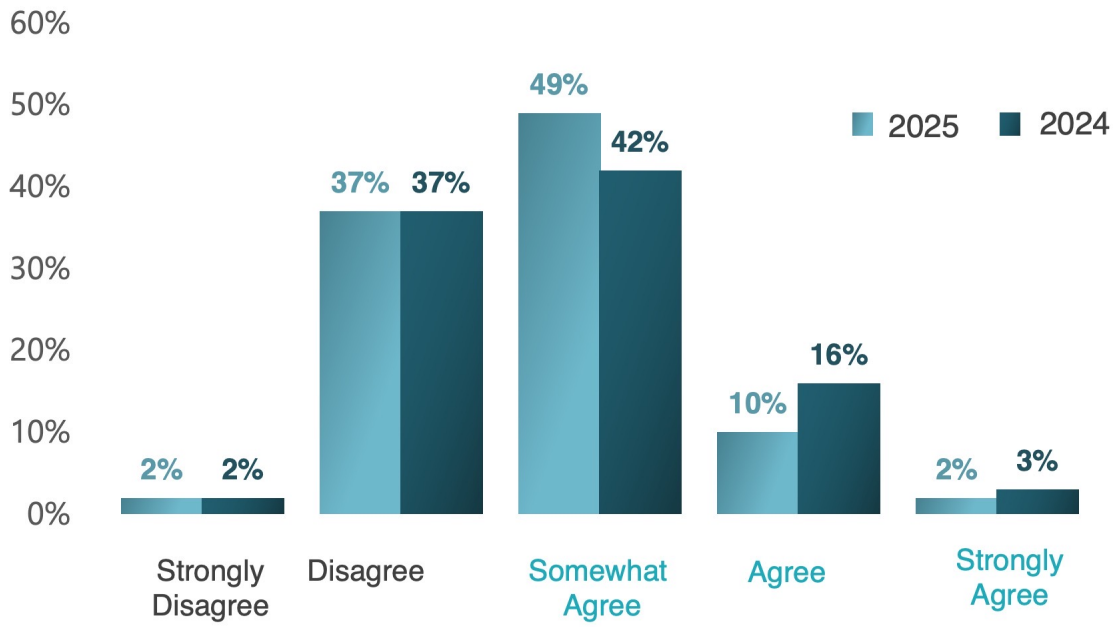
Primary Other Responses:

- Alignment to Strategy

> "This is exactly why we're seeing manufacturers revisit their retail execution strategies, and why understanding today's vendor capabilities through the POI Vendor Panorama is so critical. Execution excellence is no longer about doing more in stores; it's about enabling smarter decisions across the value chain."
>
> - Pam Brown, POI CCO
>
> *Refer to the POI Vendor Panorama, poinstitute.com, to dive deeper into the topic and understand current vendor capabilities.*

Retailer-Aligned Promotions Are Breaking Down at Store Level

Companies were asked whether they struggle to get retailer-aligned promotions executed in-store...



~ 61%
of companies still struggle to execute retailer-aligned promotions in-store, despite increased planning investment.

When promotions fail at the shelf, manufacturers and retailers lose ROI, credibility, and the ability to course-correct in real time.

In-Store Execution of Planned Promotions

Manufacturers and retailers invest a significant amount of time and effort in planning and negotiating deals. However, successfully executing these plans is crucial for achieving the desired outcomes. When retailer aligned promotions are not executed as planned at the store level, both parties fail to achieve the expected results.

Where Execution Breaks Down

Planning ≠ Execution
- **61%** struggle to execute promotions as planned
- The planning–execution gap persists despite higher investment

Limited In-Flight Visibility
- Only 8% have automated in-flight monitoring
- Execution issues often go undetected until after the fact

Manual Workarounds Are the Norm
- **37%** rely on sales reporting
- **27%** rely on manual communication
- **27%** **do not monitor in-flight execution at all**

The industry hasn't failed at planning— it has failed at execution visibility.

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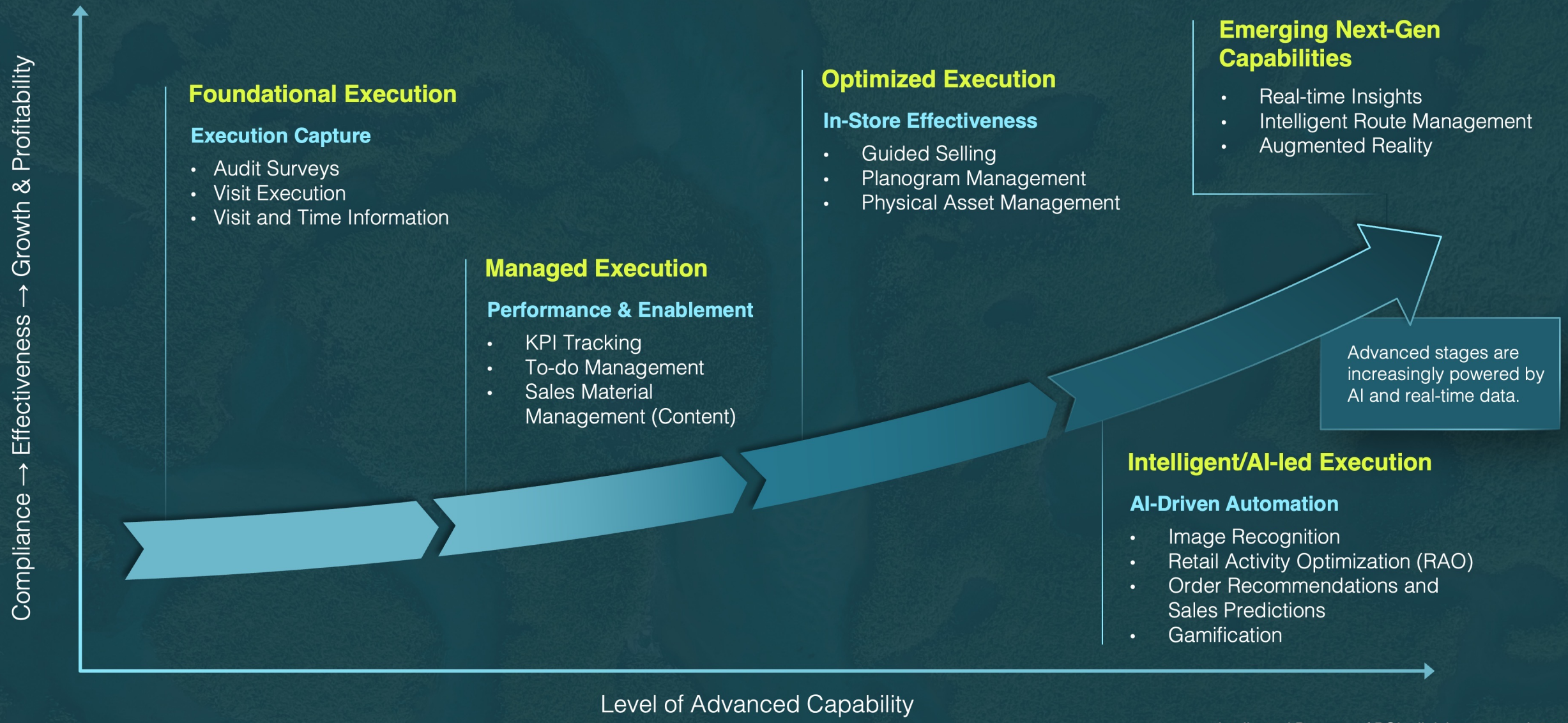
In-store Capabilities That Advance Retail Execution



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Strategic Capabilities to Consider When Assessing Retail Sales Execution Needs



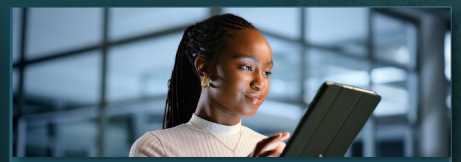
Retail Activity Optimization and Guided Selling

- Prioritize high-value stores, activities, and SKUs
- Guide reps to next-best actions, pricing, and assortment
- Drive consistent execution and higher call productivity



Connected Data & Real-time Visibility

- Unified view of execution, inventory, pricing, and promotion
- Faster issue identification and corrective action
- Foundation for AI-driven execution and analytics



Artificial Intelligence (AI) & Machine Learning

- Optimize coverage models, visit strategies, in-store pitch creation, and ordering
- Improve in-store readiness, prioritization, and compliance
- Scale decision-making with image recognition, Augmented Reality (AR), and self-service



Direct to Consumer (D2C)

- Align teams through shared KPIs and incentives
- Motivate adoption, execution quality, and continuous improvement
- Reinforce behaviors that drive retailer and consumer value



Gamification

- Align teams through shared KPIs and incentives
- Motivate adoption, execution quality, and continuous improvement
- Reinforce behaviors that drive retailer and consumer value

Close the loop between Holistic Enterprise Planning (RGM &/or TPM) and Retail Execution to gain visibility, in-flight monitoring, and investment conviction.



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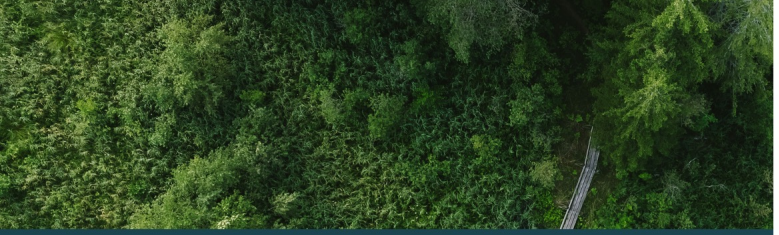


Shelf Intelligence in 2026: A Widening Execution Maturity Gap

Forty-nine percent of CPG organizations plan to enhance shelf intelligence with artificial intelligence, prioritizing capabilities such as out-of-stocks to order, missing items to order, intelligent ordering, and intelligent presentation.

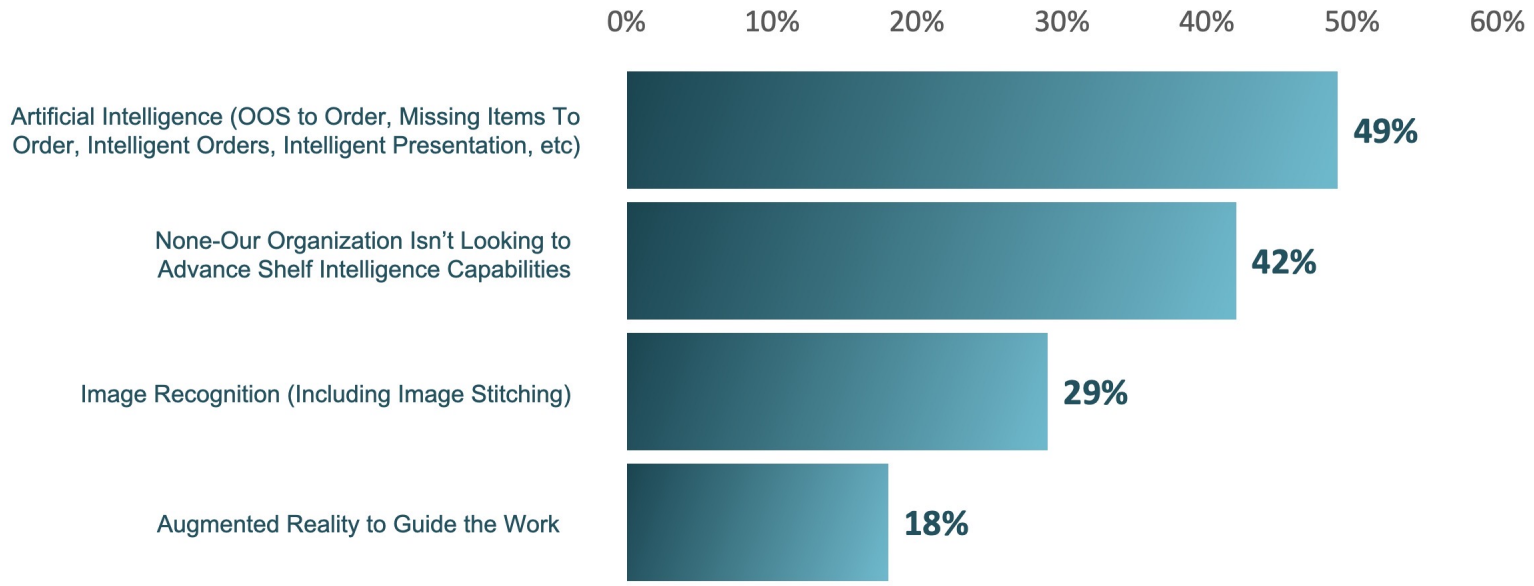
Twenty-nine percent intend to adopt image recognition, including image stitching, to quickly identify execution gaps, while **18%** are planning to deploy augmented reality to better guide in-store work and improve rep effectiveness.

At the same time, **42%** of respondents indicate they are not planning to advance shelf intelligence capabilities, highlighting a growing divide between organizations investing in execution intelligence and those maintaining legacy approaches.

As shelf intelligence, AI, and in-store analytics mature, manufacturers can improve visit productivity, identify and resolve order gaps faster, and increase execution consistency.

Organizations that invest in these capabilities are better positioned to drive incremental volume growth and stronger retail outcomes.

What shelf intelligence capabilities is your organization likely to add in 2026? (Select all that apply)



42% of organizations are not advancing shelf intelligence— creating a growing execution gap.

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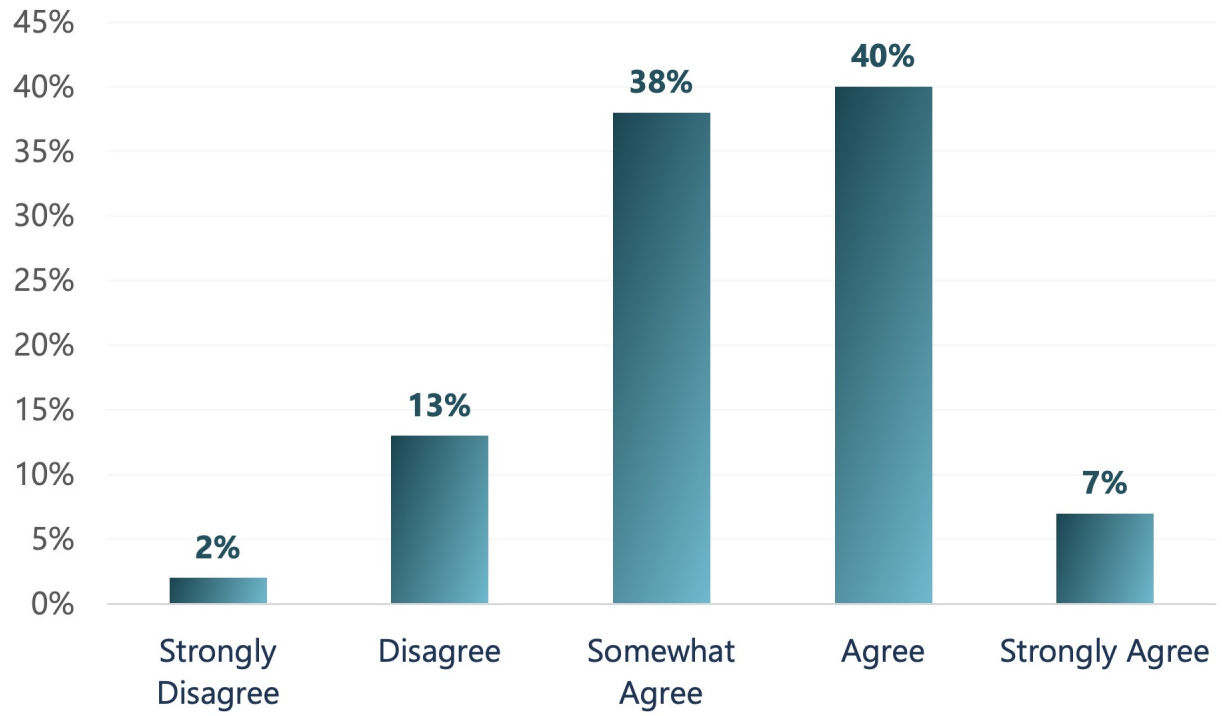
Retail execution teams are under pressure to become more analytical, yet most organizations struggle to enable this shift

Your company is facing challenges in transforming retail execution capabilities from a transactional approach to a more analytical one.



88% of companies face challenges in moving retail execution user capabilities from transactional to analytical...



According to POI's survey, **88%** of companies face challenges in moving retail execution user capabilities from transactional to analytical. **47%** agree or strongly agree with these difficulties. Additionally, **38%** of respondents somewhat agree that transitioning retail execution user capabilities from transactional to analytical poses challenges.

These insights highlight the urgency of equipping teams with user-friendly, data-driven tools and fostering a mindset shift to unlock the full potential of analytical retail execution.

Potential Transition Obstacles:

- People: Change resistance, tenure-based expertise
- Process: Manual workflows, low decision support
- Technology: Tools not designed for frontline usability

It is crucial to position technology as an enabler that enhances field sales success rather than replacing their expertise. Gamification and targeted incentives can play a pivotal role in addressing change management challenges and building trust in these solutions.

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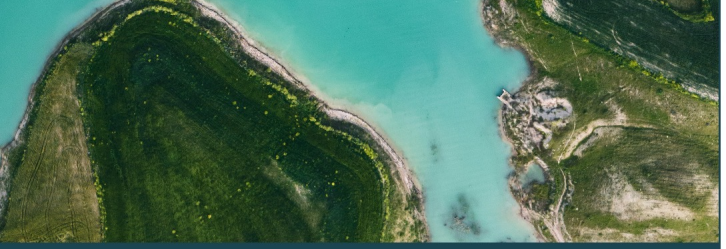


Four Value Drivers that enable Field Sales Teams to Sell More:

Automate Insight: Image recognition, compliance detection

Optimize Activity: Call prioritization, task optimization

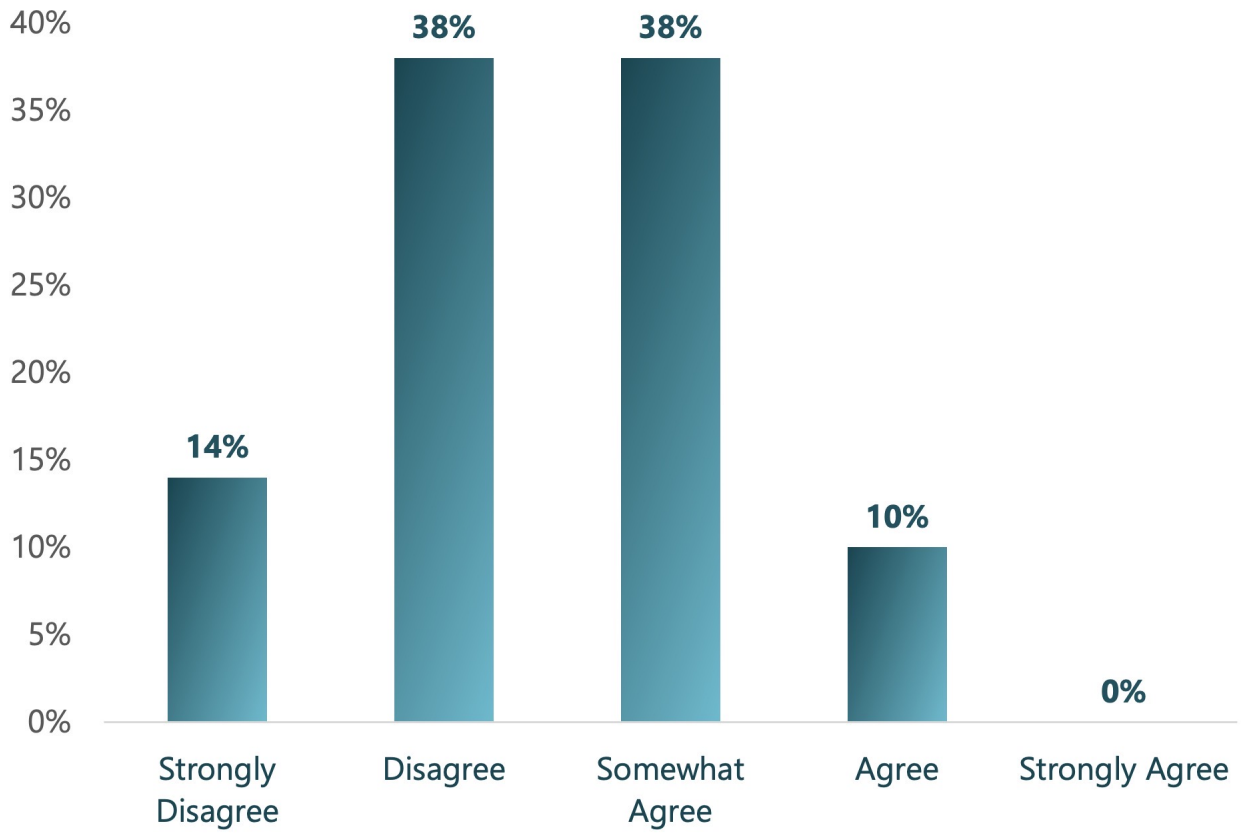
Prescribe Action: Auto-generated suggested orders

Guide Execution: Guided selling and rep enablement

In 2026, retail execution shifts from store coverage to revenue impact.

Only 48% of Companies Believe Retail Execution Helps Them Sell More

Your Company's Retail Sales Execution ROI is bolstered by Sell More Capabilities.



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Execution, Analytics, and Integration Remain Disconnected

RetX Solution Provides Office-Based Users the Ability to Make Analytical Decisions

13% agree

The disconnect between TPMx and Retail Execution systems is limiting in-flight monitoring, execution visibility, and revenue recovery.

19% agree

RetX and TPMx Solutions are Integrated. Changes in TPMx Promotions are Automatically Synced With the RetX Solution for Execution

RetX Solution has Sufficient Off-line Capabilities to Complete Complex Pricing Without a Server Connection

7% agree

For organizations that own their RetX solutions, it is best practice to integrate them with your TPMx system to enable in-flight monitoring and vastly improve your company's ability to respond when promotions don't initially execute as expected.

In recent years, POI has seen heavy solution provider investment in offline capabilities.

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POI Retail Execution Recommendations

Anchor the Organization on Core Principals:

1. Connect Digital & Physical Experiences
2. Enable Reps With Intelligence, Not Just Tasks
3. Use Execution Data to Drive Enterprise Visibility
4. Design for Regional and Market Variability

The POI survey indicates that 81% of organizations don't connect their retail execution systems to TPM/TPMx planning capabilities. This limits enterprise visibility to actual retail shelf conditions, in-flight monitoring, and promotion & shelf compliance.

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Your Guide to Retail Execution Vendor Capabilities

Current and relevant insights to help you on your Retail Execution journey!

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Advancing Intelligent Planning and Analytics

AI Is Not a Tool Decision — It's an Operating Model Decision

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How Are You Building AI Into Your Enterprise Strategy?

If AI Is Not Embedded in How Work Gets Done, It Will Not Deliver Value



Today's advanced TPMx platforms leverage AI to streamline critical tasks, including predicting baselines, calculating real-time promotion uplifts, and projecting plan volumes with greater accuracy. These capabilities empower organizations to optimize decision-making, improve promotional outcomes, and stay competitive in a rapidly evolving market.

Additionally, some vendors are taking AI further by integrating machine learning systems that gather competitive intelligence from the internet and combine it with internal consumer behavior data. This approach enables companies to better understand price elasticities, predict customer trends, and develop more effective strategies for managing revenue growth.

There are current examples of AI use in retail execution with order recommendations, inventory management, pitch content creation, and more. Many retail execution vendors are currently incorporating AI into their solutions. AI can greatly improve worker productivity and enhance decision-making at the store level. It is also crucial for organizations to understand the importance of having offline capabilities to bridge gaps where bandwidth is limited.

Currently, **9%** of the respondents are already working on integrating AI capabilities to impact retail execution, while **30%** believe their organizations will embrace AI in RetX when it becomes more affordable and proven in 2-3 years.

Intelligent automation can perform routine, predictable tasks, enabling an organization to redeploy resources to more strategic work. Intelligent automation can work 24 hours a day, providing enhanced service hours & scalability.

Leadership Actions:

- Evaluate and record repetitive planning and execution decisions across TPMx, RGM, and RetX.
- Determine where manual efforts or decision delays result in lost opportunities, revenue, or margin leakage.
- Collaborate with vendors and system implementation partners to assess changes in people, processes, and systems as new technologies are investigated and deployed. This is important because both the work itself and our methods of carrying it out are evolving.

POI Recommendations:
Assess which decisions consume the most time, rework, and judgment today.

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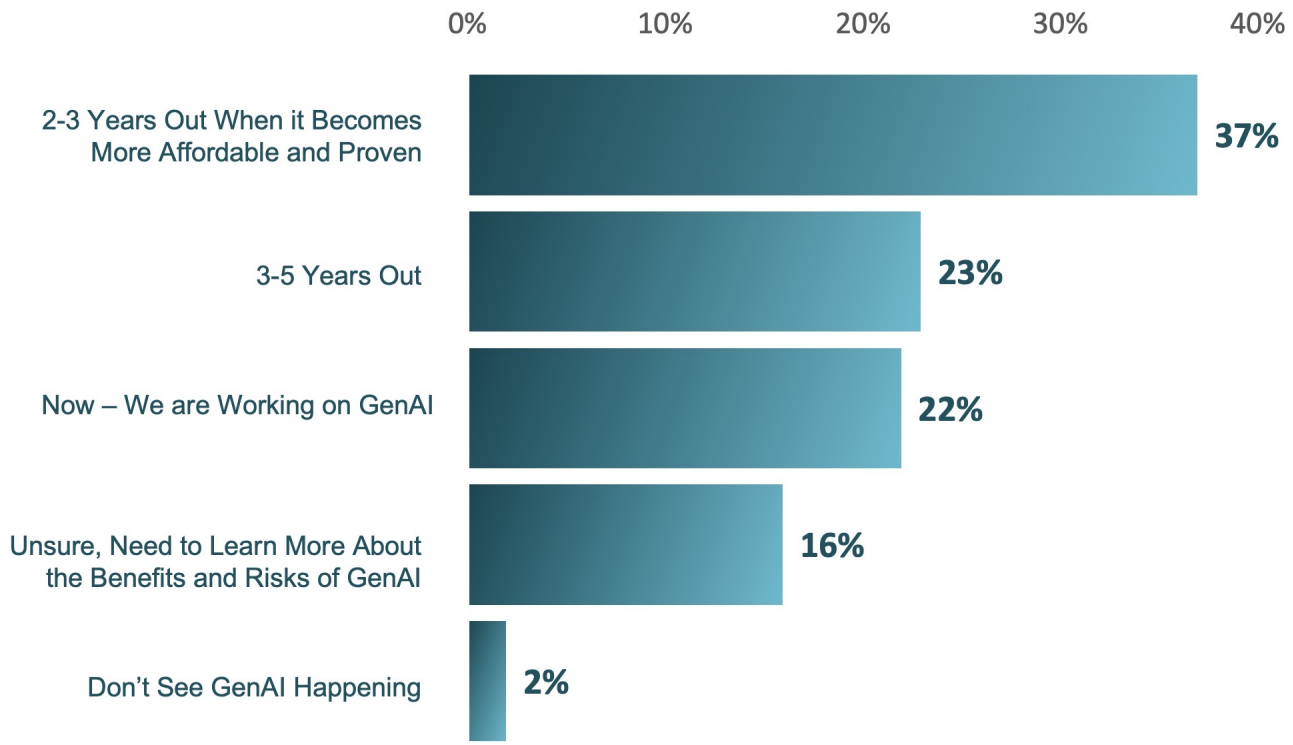
Modern Enterprise Platforms Are Shifting From Transactional Systems to Systems of Intelligence

When do you see Generative AI impacting Holistic Enterprise Planning™?



Opportunity: Determine how your organization can take steps to utilize Generative AI in your enterprise planning process. It can be layered into analytics, scenario planning, and reporting today.

POI research reveals that Generative AI (GenAI) capabilities and usage are an opportunity for the CPG industry:

Twenty-one percent are taking action now and are already working to incorporate Generative AI into their company's Holistic Enterprise Planning™ process.

Thirty-seven percent of respondents expect Generative AI to impact in 2 to 3 years, once it becomes more affordable and proven.

Twenty-three percent of survey respondents noted they expect Generative AI to impact holistic enterprise planning™ in 3 to 5 years.

Sixteen percent are unsure and need more information on the benefits and risks of Generative AI.

Over the past three years, POI Summit attendees have witnessed the growing impact of Generative AI on RGM analyses. While this technology is still evolving and requires users to validate system recommendations, POI anticipates that Generative AI and related advancements will significantly enhance the enterprise planning process in the near future.

AI Delivers Value When Embedded Into Planning & Execution Workflows — Not as a Standalone Capability

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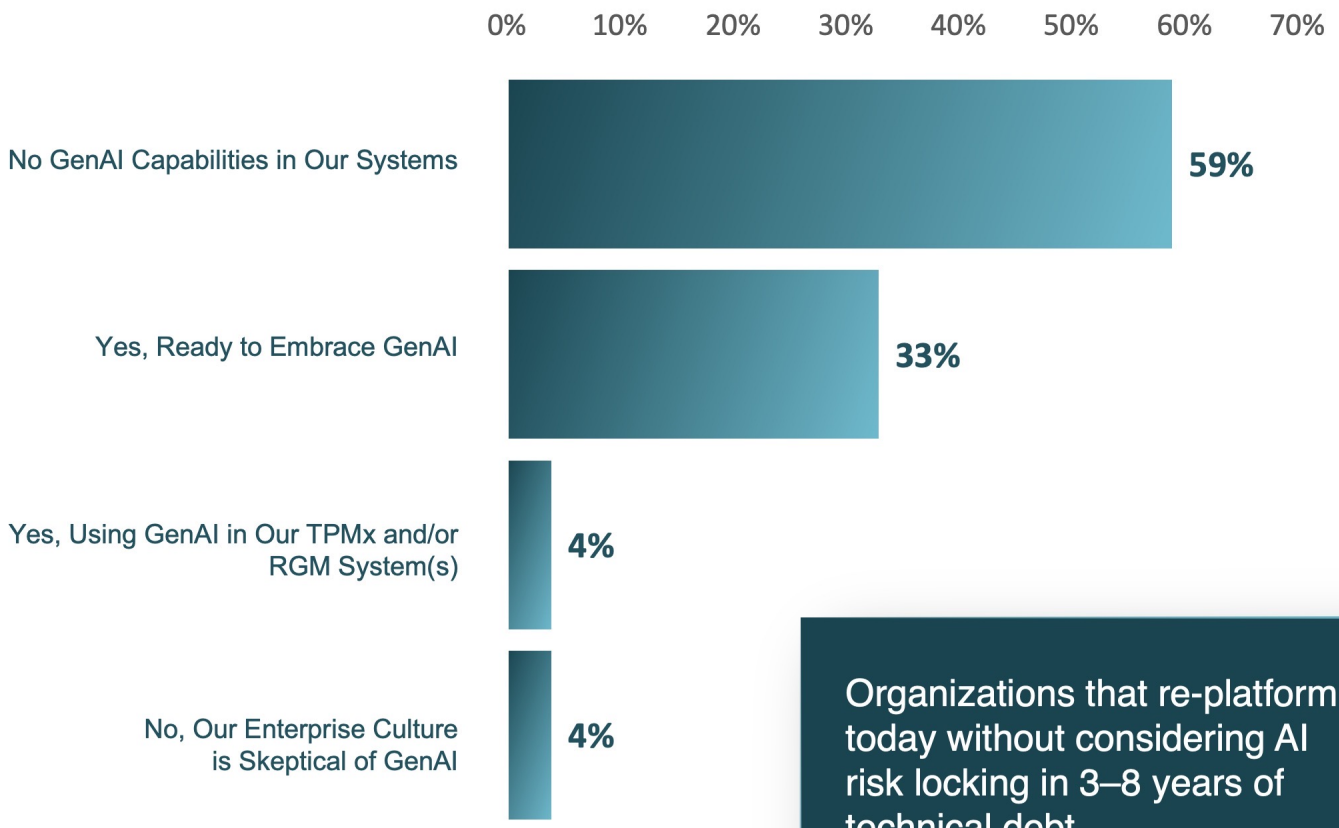
Generative AI Will Impact Enterprise Planning Faster Than Most Organizations Expect

Will your organization embrace using Generative AI with your TPMx and RGM systems to improve promotion execution and optimization?



Organizations that re-platform today without considering AI risk locking in 3–8 years of technical debt.

A Transformative Opportunity for CPG Planning:

Despite its proven potential, the adoption of Generative AI in the CPG industry remains nascent. As the graph illustrates, only **4%** of organizations have actively integrated Generative AI into their TPMx and RGM systems. However, with **33%** of respondents indicating readiness to embrace this technology, there is a clear appetite for innovation.

Modern TPMx and RGM platforms have woven AI into planning workflows. (Refer to POI's EPx Vendor Panorama - https://poinstitute.com)

Bridging the Gap Between Potential & Adoption:

While **59%** of organizations report that their systems have not yet evolved to include Generative AI capabilities, this highlights a significant opportunity for forward-thinking companies to lead the charge. Those who embrace AI-powered tools early will gain a competitive edge by streamlining promotion execution and unlocking new efficiencies in revenue growth management. The industry must address technical and cultural barriers to accelerate adoption.

Breaking Through Cultural & Technical Barriers:

The survey reveals that cultural skepticism toward Generative AI is relatively low, with only **4%** of respondents citing it as a barrier. This suggests that the primary challenges lie in system maturity rather than resistance to change. By upgrading infrastructure and demonstrating AI's tangible benefits, the CPG sector can fast-track the integration of Generative AI, transforming how planning processes are executed.

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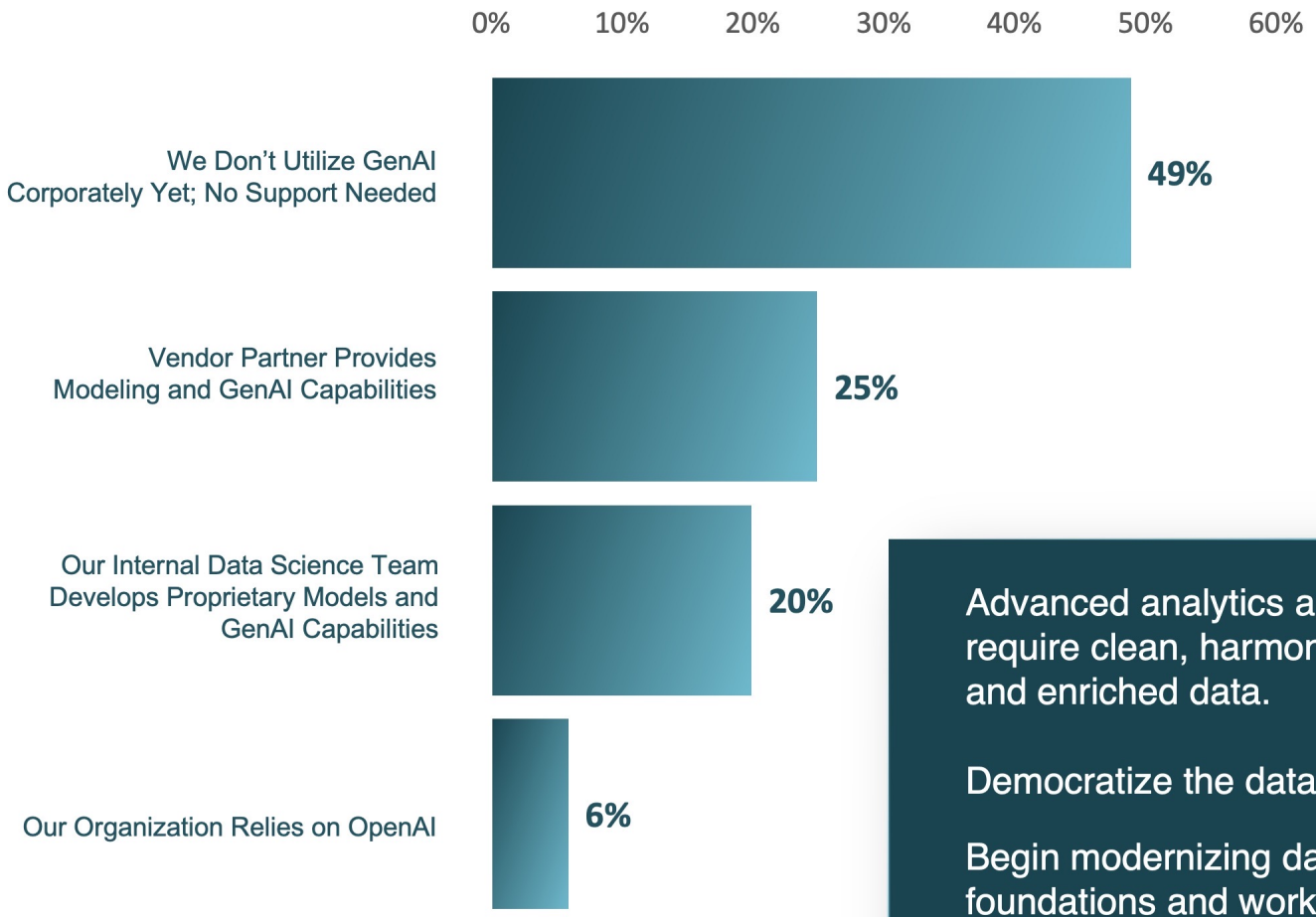
There Is No Single “Right” Path to GenAI Adoption — But There Is a Wrong One: Doing Nothing

Who supports your organization's GenAI model development?



Advanced analytics and AI require clean, harmonized, and enriched data.

Democratize the data.

Begin modernizing data foundations and workflows.

Key Insights:

1. Massive Opportunity for Adoption

49% of organizations have yet to adopt GenAI, highlighting an untapped opportunity to drive efficiency and innovation through AI-enabled processes.

2. Vendor Partnerships Drive Early Success

25% rely on external vendors for GenAI capabilities, showcasing how third-party expertise helps bridge gaps in knowledge, infrastructure, and resources.

3. Proprietary Innovation is Emerging

20% have in-house teams developing proprietary GenAI models, setting the stage for competitive advantages in predictive and prescriptive insights and operational optimization.

4. OpenAI Usage is Minimal

Only **6% leverage platforms like OpenAI**, suggesting broader potential for these tools to democratize access to generative technologies.

Call to Action:

Organizations need to prioritize GenAI exploration to remain competitive. They should leverage vendor partnerships and accessible platforms like OpenAI, while learning from early adopters to accelerate their AI maturity curve.

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AI Accelerates Value When Embedded Across Data, Decisions, and Execution

Most CPG organizations are still experimenting with AI rather than operationalizing it.

Leadership Actions to Advance AI Maturity:

- Prioritize data readiness as the foundation for AI success
- Embed AI into existing TPMx, RGM, IBP, and Retail Execution workflows
- Shift from AI pilots to AI-enabled decision processes

AI is No Longer Optional — It is the Next Source of Competitive Advantage in CPG.

Enterprise planning is no longer about independent business units — It is about AI-enabled speed, decision & investment conviction, and cross-functional alignment.

The CPG industry is early in AI maturity, and the window to build a competitive advantage is open now.

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AI With Purpose: Practical Applications Across the CPG Value Chain

AI delivers the greatest value when applied to data-rich, repeatable CPG processes - where insight speed and decision quality matter most.

Additional CPG Industry Uses of Artificial Intelligence Across Holistic Enterprise Planning™ & Execution:



Product Strategy: Optimize innovation, product offerings & mix.



Beyond Customer Satisfaction Analysis: AI systems can provide real-time trend detection by analyzing online behavior, social media, and eCommerce platforms, enabling manufacturers to adjust marketing and inventory strategies swiftly.



Personalized Content: With online, content is king. Create marketing assets & targeted campaigns tailored to an individual or group's specific needs and desires to generate engagement.



Pricing Strategy: Optimization of innovation, everyday on-shelf, and promoted pricing. Utilize scenario planning to develop pricing strategies that maximize profits, volume, and consumer engagement across channels, retailers, and brands.



Enterprise Forecast: Artificial intelligence utilizes predictive and prescriptive capabilities to anticipate the enterprise forecast through advanced modeling of inputs to project enterprise revenue and volume. Evaluation can include AOP volume/spend/targets, baseline, incremental lift, and driver inputs like promotion timing, depth of discount, duration, etc. Leading organizations also incorporate supply constraints into the AI modeling. AI greatly impacts an organization's ability to get to the desired "One Forecast" and "One Version of the Truth" and positively impacts the integrated business planning process (IBP).



Claims/Deductions: Empowering the process with AI can automate an estimated 80% of manual trade and non-trade claims/deductions processing. Issues and trends can be identified, prioritized, and cleared quickly. Enables deduction specialists to focus on the issues that require deeper investigation. It is estimated AI automation reduces deduction resolution timing by 50%.



Retail Execution Planning: From account scoring, route planning, retail activity planning (RAO), guided selling, distributor opportunities, telesales prioritization, perfect store recommendations, and addressing both OLA (online availability) and OSA (on-shelf availability).



Chat Bots: Gather online questions and data from customers and systematically recommend answers and solutions. Prepare data for secondary human assistance to expedite solutions when necessary. Employees have time to focus on issues that require personalized attention.



Customer Satisfaction: Through scanning of social media posts, reviews, ratings, and other customer data, brands gather insights on how customers are engaging with and perceive their brand, as well as the competitive marketplace.



Optimizing Supply Chain: Including sourcing, procurement of raw material pricing, transportation optimization, predicting inventory location, and product movement throughput.

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Additional CPG Enterprise AI Use Cases

Expanding AI Beyond Automation: Where CPG Leaders Are Applying AI Next



Sustainability Efforts:
AI can optimize production processes to reduce waste and energy consumption, align with environmental regulations, and enhance sustainable practices. For example, predictive analytics can improve material utilization or forecast renewable energy needs for manufacturing.



Workforce Augmentation:
AI can enhance workforce productivity by automating repetitive tasks, enabling employees to focus on higher-value strategic activities. AI-powered training tools also improve employee onboarding and skill development.



Innovation Acceleration:
Generative AI can assist in R&D by simulating product formulations, designing new packaging, or even brainstorming marketing campaigns based on consumer trends.



Enhanced Supplier Collaboration:
AI-powered platforms enable better communication and collaboration with suppliers by predicting demand fluctuations and optimizing order quantities, reducing the risk of stockouts or overstocking.

These CPG use cases do not require “big bang” transformation — they build on existing processes and data.

As consumer behavior, retail dynamics, and operating complexity accelerate, CPG organizations are leveraging AI to improve responsiveness, decision quality, efficiency, and growth — without fundamentally changing how the business operates to gain a competitive advantage.

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From Manual Trade Planning to Intelligent, Connected Enterprise Decision-Making

Historical Planning

- On-Premise
- Planning within Business Unit Silos
- Manual, Excel-driven
- Fragmented visibility
- Reactive decision-making

Today's Intelligent Holistic Enterprise Planning™

- SaaS
- Cross-functional, connected, end-to-end value chain planning
- AI-driven baselines and uplift
- Generative, agentic, and autonomous planning insights
- Automated post-event ROI analytics & what-if promotion scenarios
- Advanced RGM modeling and optimization
- Real-time collaboration, visibility, and insights

The most advanced omnichannel platform capabilities anticipate market opportunities and risks and prescribe specific actions to execute across promotions, pricing, assortment, etc., to gain a competitive advantage. A few leading companies use daily retail consumer data to optimize marketing and sales planning. The most advanced solutions enable manufacturers and retailers to address changing consumer behavior and target the right innovations, promotions, pricing, displays, marketing, etc., at the right time to engage consumers and positively influence buying decisions.

While many solutions offer enterprise planning, a leading few solution providers can deliver an end-to-end, full-value chain approach, delivering optimization and revenue management from farm to fork.

Enterprise reporting and dashboards have advanced, and many platforms have extensive social capabilities to keep teams connected about plan changes. In-flight monitoring is also advancing across the platforms. As companies connect their revenue management, trade planning, and retail execution systems, teams can manage unexpected challenges with agility and respond more effectively to consumer and retailer needs.

The platforms available in 2026 will help the enterprise develop effective, accurate plans, quickly support Integrated Business Planning and Joint Customer Business Planning efforts, and enable organizations to shift tactical work toward more strategic priorities.

With the latest modern EPx technologies, companies are beginning to automate IBP inputs and enable a single forecast; one version of truth.

If your company is looking to advance Enterprise Planning (TPMx, What-if Scenario Planning, ROI, RGM/TPO) or Retail Execution capabilities, please refer to the POI Vendor Panorama at poinstitute.com to learn more and assess current vendor capabilities.

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Advanced Modeling

Based on POI's Latest Enterprise Planning and Retail Execution Vendor Panorama Research:

While the technology exists to maximize AI's potential, most Enterprise Planning (TPMx & RGM) and Retail Execution solution providers currently focus on statistical models and predictive AI modeling for specific, defined planning and reporting use cases (e.g., automating baselines, generating promotional planning insights, recommending orders), the industry at large has yet to fully adopt or maximize AI's broader capabilities.

Select vendors have advanced modeling approaches and can deliver:

Decision-Making AI: AI has evolved from use-case-specific applications to powering end-to-end enterprise planning ecosystems, which enable real-time updates, cross-functional collaboration, and adaptive business strategies.

Nonlinear Problem Solving: Select leading vendors are leveraging advanced nonlinear modeling to address complex interdependencies, unlocking transformative opportunities for businesses.

Strategy Creation: AI moves beyond historical analytics to dynamically generate sophisticated, scenario-based go-to-market strategies. Advanced AI modeling enables organizations to adapt to changing consumer behavior, market shifts, and economic headwinds, helping them stay ahead of the competition.

AI for Transparency & Trust: Breakthrough mathematical analytics delivers actionable, transparent recommendations in natural language, increasing explainability, fostering trust, and driving faster adoption.

Organizations with leading-edge AI modeling can respond dynamically to market changes, optimize interdependent variables, and unlock significant enterprise value.



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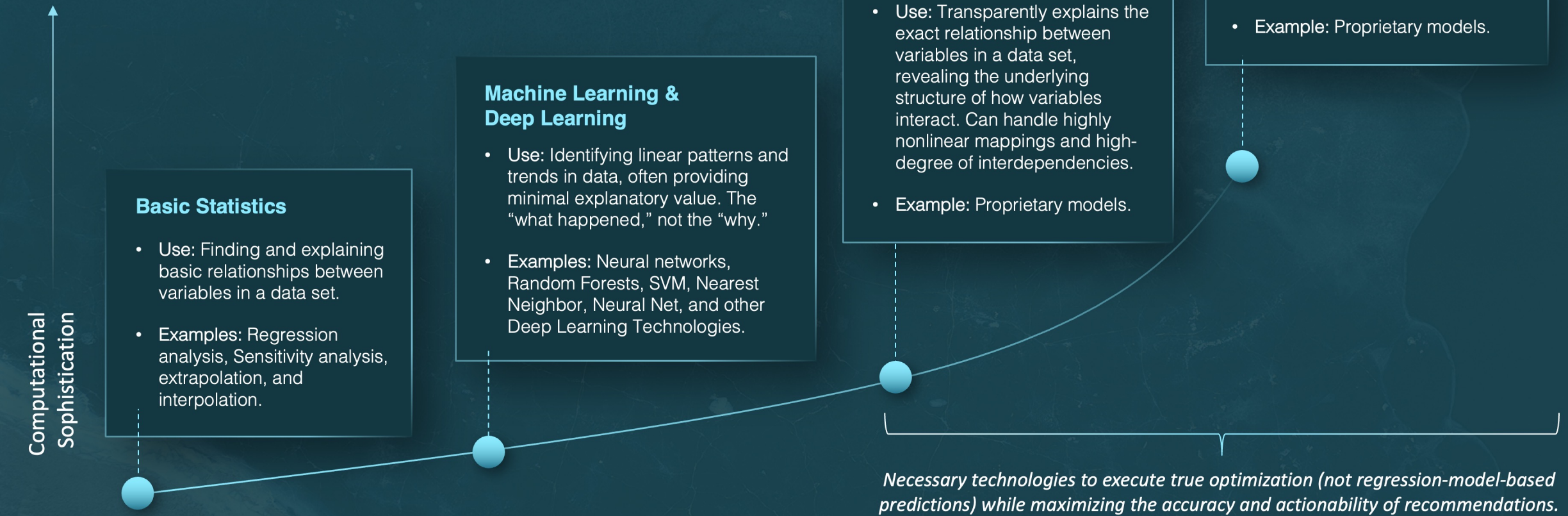
Evolution of Analytical Modeling Techniques

The type of model matters - Advanced modeling increases the understanding (why?), accuracy, and actionability of RGM recommendations:



ENTERRA SOLUTIONS®

Thank you to Enterra Solutions, LLC. who provided the Analytical Modeling Technique graphic

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Integrating intelligent systems across an enterprise ecosystem can support cross-functional AOP top-down planning, pricing, innovation, go-to-market strategy development, promotion optimization & planning, forecasting, deductions, supply chain optimization, retail execution, and advanced analytics across the company.

As organizations integrate systems of intelligence, roles and tasks will naturally evolve.

This enterprise transformation can serve as a catalyst for breaking down internal silos. However, it is essential for organizations to implement change transformation throughout the process.

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Change Transformation

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Effective change transformation is crucial to enhancing all aspects of work across Consumer Packaged Goods (CPG) manufacturers and retailers. Since people are dynamic and essential to our organizations, it is important to support them through ongoing changes.

Organizations are experiencing change not as isolated events, but rather in a continuous, wave-like manner.

To navigate these waves of change and improve organizational dynamics and results, CPG manufacturers and retailers need robust change transformation strategies.

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Transformation isn’t a single event.

It’s a continuous evolution, powered by people, process, and purpose. It takes an organization of leaders to digitally and operationally transform an organization.

RGM & Sales Strategy leaders are ideally suited to guide organizations through transformation. They excel at thinking holistically and breaking down silos as part of their role. As natural builders of alignment and consensus, they influence others daily and possess an innate ability to anticipate the organization's needs.



Transformation Is a Leadership Mindset, Not a Milestone

- True transformation isn’t a one-time initiative — it’s a cultural shift toward adaptability and learning
- Leaders must model curiosity, resilience, and agility as constants, not exceptions
- Every level of leadership should reinforce that transformation is a journey powered by evolution, not completion



Lead Through People

- Empower and equip teams to take ownership of change — transformation succeeds only when people feel part of it
- Cultivate psychological safety so teams can challenge old processes and innovate without fear
- Recognize that digital transformation is 80% human and 20% technology — mindset precedes toolset



Lead Through Process

- Define clear governance and agile processes that are cross-functionally aligned
- Continuously refine processes to be data-driven, consumer-centric, and responsive to market realities
- Ensure that process evolution keeps pace with technology — simplicity over bureaucracy



Lead Through Purpose

- Ground change in a shared mission — why we transform matters more than what we transform
- Communicate a compelling “North Star” that aligns every function around the consumer and long-term value
- Purpose provides stability amid change; it’s the constant when everything else is evolving



Collective Leadership Across the Organization

- Transformation isn’t the role of a single executive or function — it requires a coalition of leaders
- Foster horizontal collaboration — TPMx, RGM, Supply, Sales, Marketing, and Finance leading together
- Build leadership capability at every level to sustain progress beyond the initial activation



Activate and Sustain Change

- Celebrate small wins that demonstrate progress toward transformation goals
- Reinforce new behaviors through recognition, storytelling, and measurement
- Continuity of leadership focus ensures transformation doesn’t fade when the project phase ends

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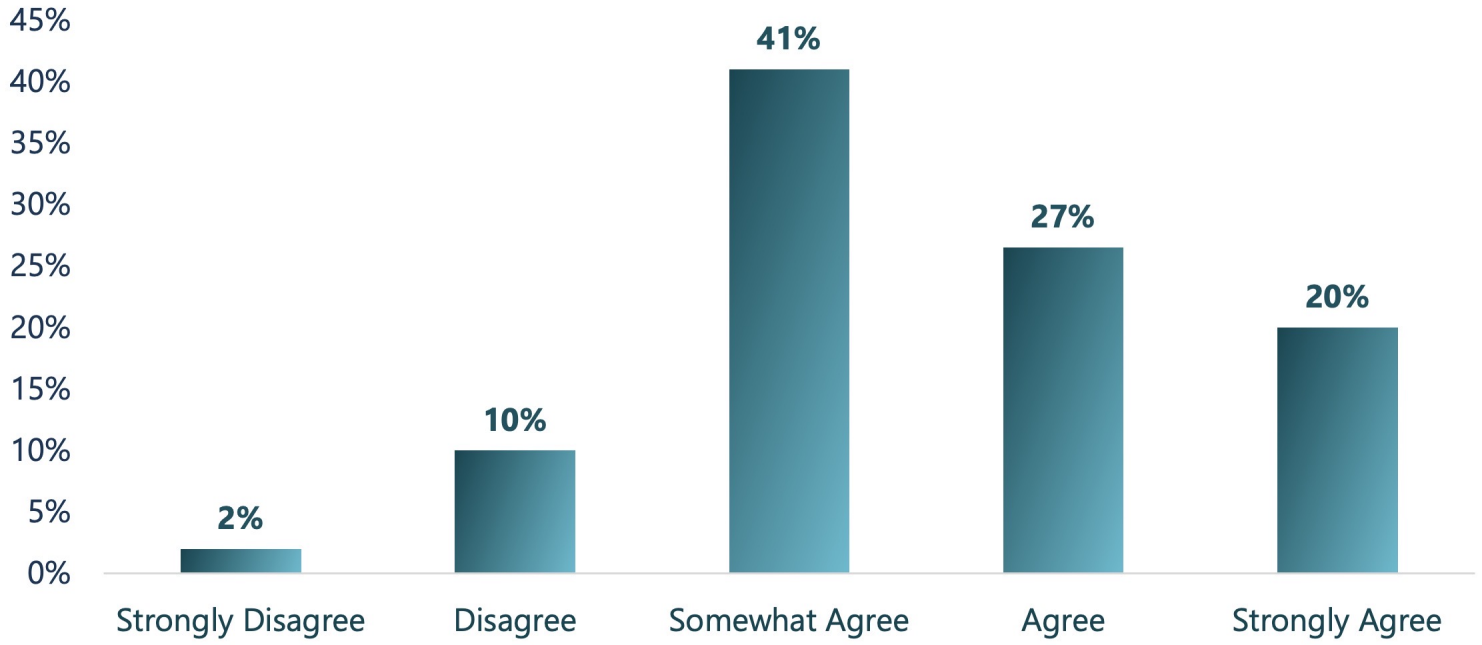
A focus on change transformation is crucial for the success of TPMx implementations, as it significantly impacts financial visibility and stewardship across the enterprise.

It is essential that CPG manufacturers and retailers prioritize change transformation as they implement new capabilities.

Currently, **88%** of respondents agree that change management has been an issue with users, while only **12%** feel they are implementing change well.

This is critically true with TPMx implementations. There is a direct link between change transformation, training support, and successful transformations.

Change transformation has been an issue among TPMx users.



Based on the POI State of the Industry Survey, 88% of respondents agree that change management has been an issue with users.

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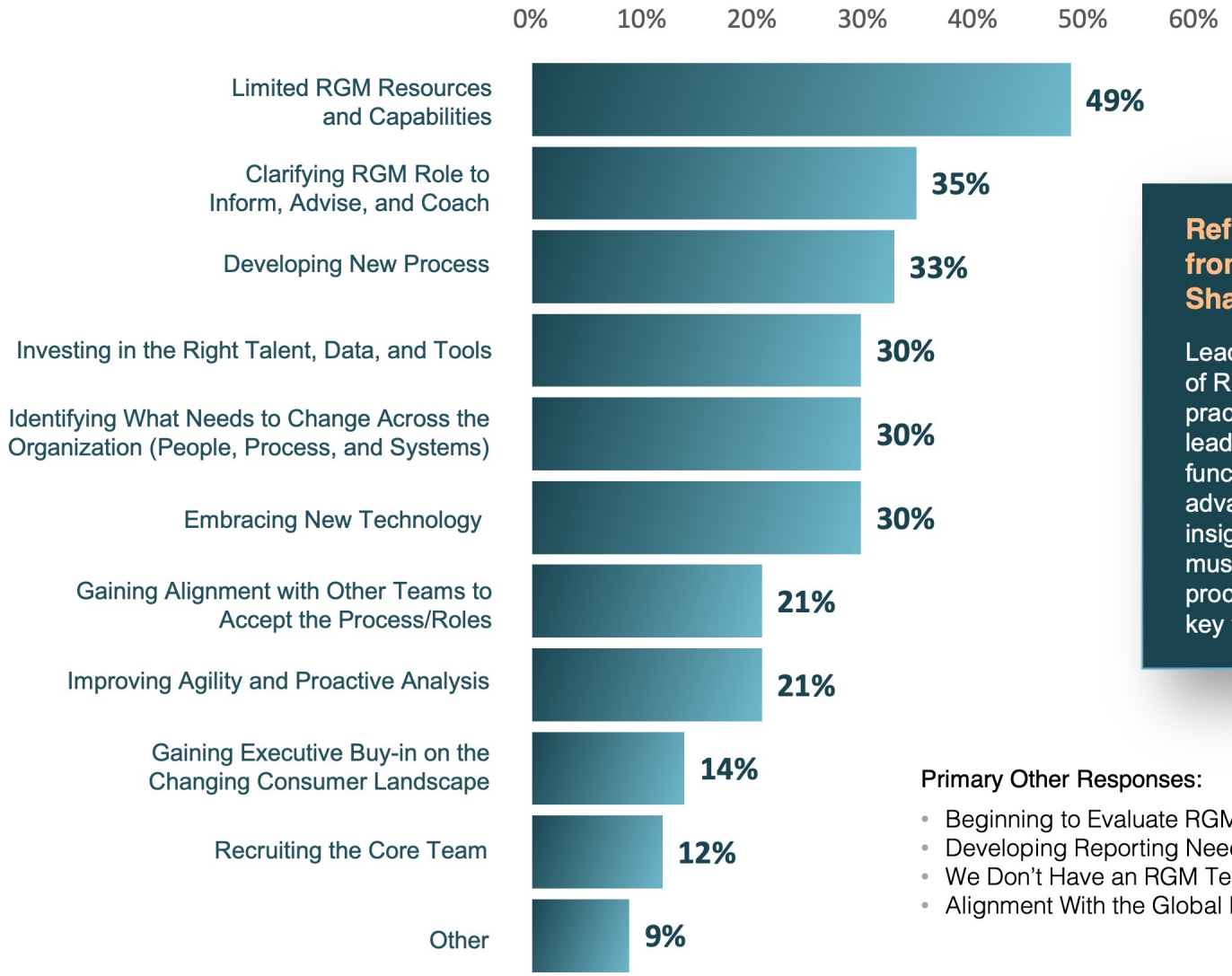
Effective change is rooted in supporting "people." This includes addressing resource constraints, developing new processes, recruiting and training the right talent, and adopting new technologies and reporting methods. This is true for our RGM teams as well.

Forty-nine percent of the survey respondents report having limited RGM resources. This is a critical gap, as RGM teams not only support the implementation of TPMx change transformation but are also essential for fostering a revenue-focused mindset across the organization. Without sufficient RGM resources, the change transformation will need to be led by other departments.

Thirty-five percent of survey respondents report struggling to clarify RGM's role in informing, advising, and coaching their organizations. RGM teams desire to be trusted advisors to their cross-functional partners, requiring time, knowledge, and the ability to communicate quick wins to succeed.

What have been your largest RGM change transformation struggles? (Select all that apply)



Reflection Point: from the POI RGM Share Group

Leadership's comprehension of RGM is critical. As the practice matures and RGM leaders provide cross-functional teams with advanced analytics and insights, the organization must adapt its workstreams, processes, and ownership of key tasks.

Primary Other Responses:

- Beginning to Evaluate RGM Solutions
- Developing Reporting Needs – Bringing Data Together
- We Don't Have an RGM Team Yet
- Alignment With the Global RGM Organization

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Enterprise Planning Change Transformation



Embedding New Capabilities into Organizational Processes

- Align cross-functional teams with key workflows
- Update performance metrics to embed organizational priorities and desired project outcomes



Change Communication Strategy

- Craft a clear narrative explaining the "why" behind the project and what is changing. Don’t forget the WIFM-“what’s in it for them”
- Regularly update the organization on progress and wins



Cultural Shifts for Growth Mindset

- Foster a culture of enterprise collaboration and agility to adapt to new insights
- Encourage innovation and experimentation, especially with new revenue strategies



Pilot Programs for Iterative Learning

- Launch projects in controlled environments or select regions to test and refine processes
- Use pilot results to build confidence and inform the broader rollout



Continuous Feedback and Adaptation

- Establish feedback loops to monitor adoption and effectiveness
- Adapt strategies based on employee and stakeholder insights



Recognition and Reinforcement

- Celebrate milestones and individual contributions to drive motivation
- Integrate project success into the organization's reward systems

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Change Transformation is About User Adoption

User adoption is the touchstone of any great implementation or project. A solution or platform isn't considered "successful" until users adopt it and continue using it to improve efficiency.

The only way to have users fully adopt new technology or processes is to show them how these capabilities will improve their personal performance.

Change Transformation & Project Ascent



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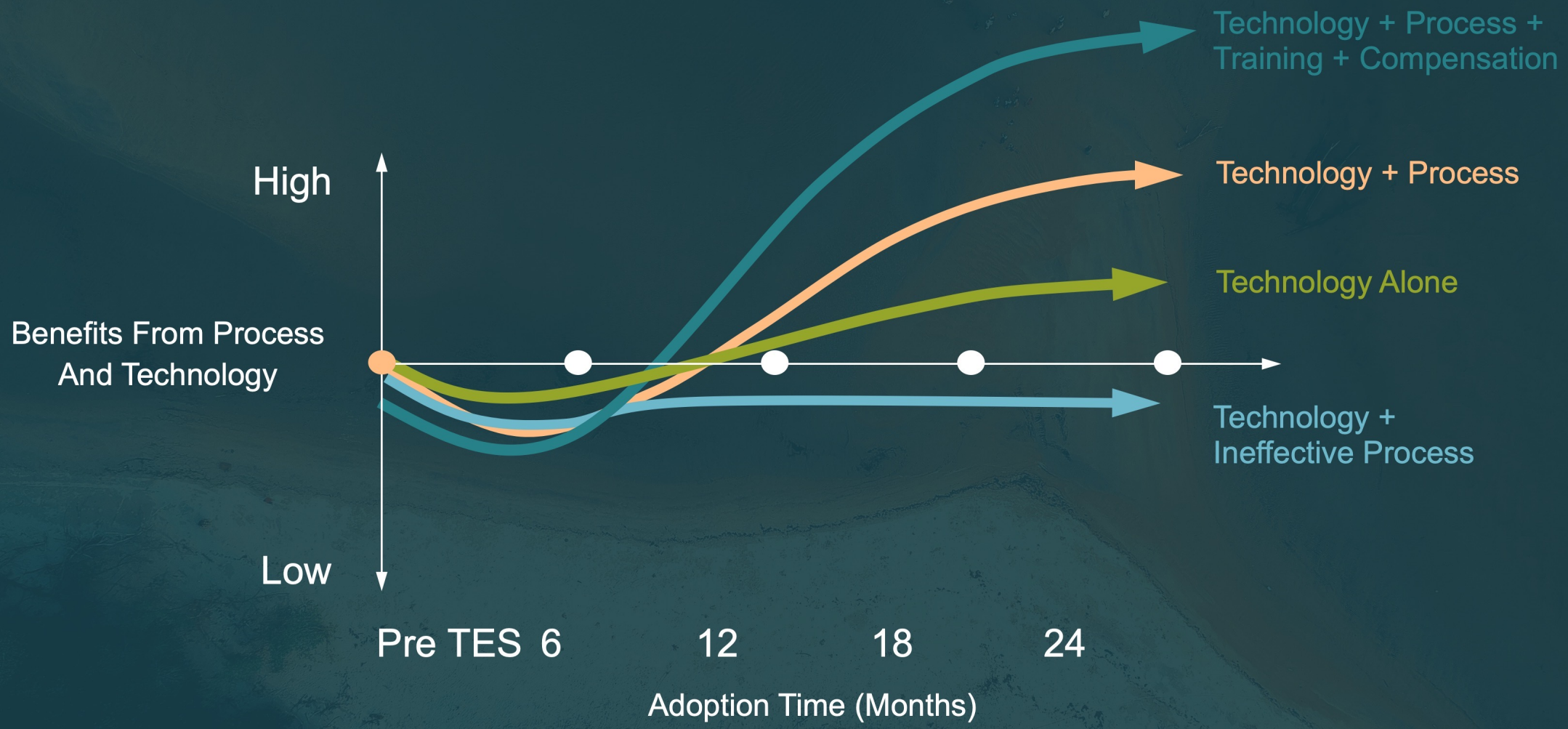
When Incentives Are Applied, Adoption Accelerates



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Next Steps – Prepare for Growth



Create an Organization That Can Respond Agily

- Consumer
- Retailer
- Supply
- Internal organization



Share and Learn From Industry Peers

- Manufacturers/Retailers
- Trade Associations (e.g., POI)



Establish Internal & External Collaboration

- Consumer
- Retailer
- Supply
- Internal organization



Redefine Enterprise Strategies for Efficient Growth

Including end-to-end cross-functional teams, work-from-home practices, M&A, Divestitures, etc.



Redevelop an Enterprise Execution Plan

Internal and consultative resources focused on delivering strategic priorities.



Prioritize I.T. Investment Plans

Digital, Enterprise Planning, Supply Chain, Optimization & Advanced Analytics (Intelligent Enterprise Data & Analytics Driven AI/ML Models), eCommerce, and D2C.

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> As the CPG landscape evolves, manufacturers who are innovative, agile, and ready to reinvent consumer-centric strategies will be able to plan, partner, and execute effectively. This approach will help them build resiliency and gain a competitive advantage.
>
> Simply reacting to change is not a strategy. The ability to respond quickly to shifts in the marketplace and retailer needs will foster mutual growth and enhance investment conviction.

Pam Brown
Chief Commercial Officer,
Promotion Optimization Institute (POI)

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Survey Methodology & Respondent Statistics

Survey Methodology

Based on multi-year survey results, POI analyzes the data, which is known as a longitudinal study. It isn't perfect because respondents change, or sometimes they aren't able to take the survey in subsequent years.

Nevertheless, this provides a richer look at the market because, across the six years included in this study, we have been able to:

- Maintain consistency in survey respondents over the years. POI is engaged with several dozen people who continue to be at the same companies and have provided ongoing survey input from 2015 to 2025. This is one element of the longitudinal analysis.
- Continually track progress at the 42 companies that participated in the inaugural 2015 survey. This provides company continuity over time.
- Tracks continuity of over 97 companies that have taken the survey in the last 6 years, spanning 2018 - 2025.
- Bring in 6 new companies this year to lend a perspective to what we found last year. In some cases, the results are quite similar; in others, we observed the beginning of a trend.
- Capture the feedback of over 146+ CPG companies in the industry.

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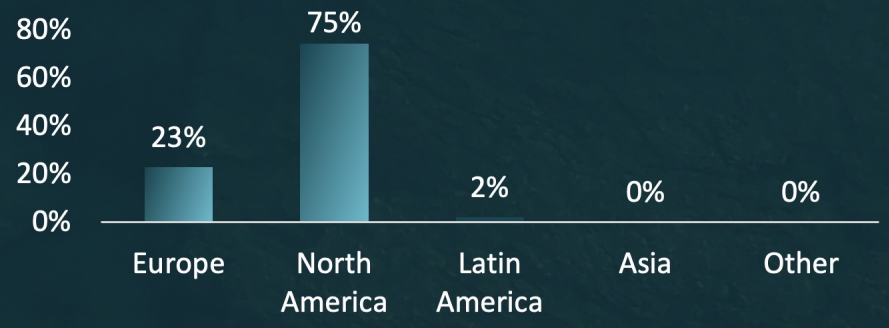
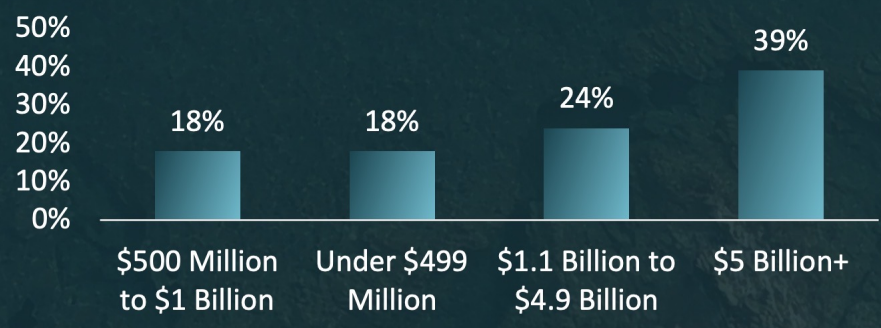
Descriptive Study & Participant Statistics

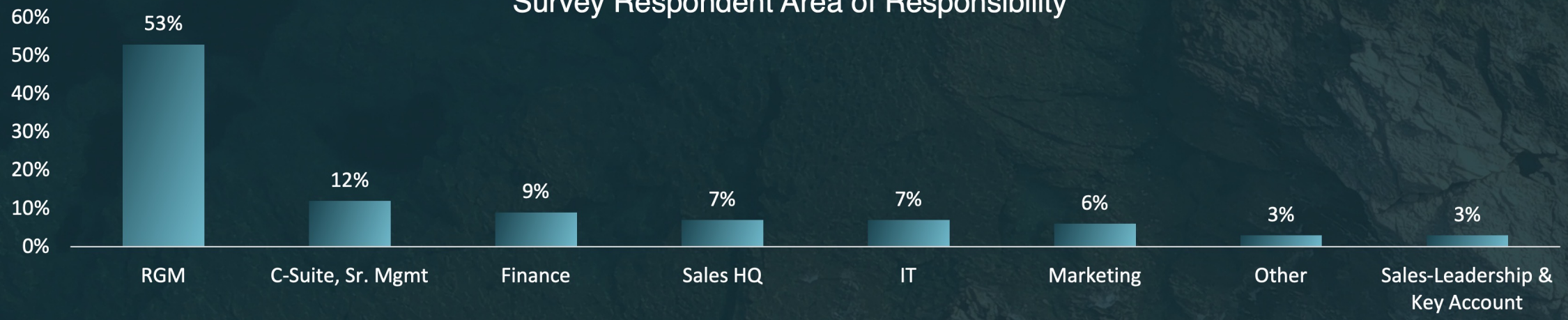
Location of Corporate HQ



Total Revenue



Survey Respondent Area of Responsibility



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About the Author

As Chief Commercial Officer, Pam creates and executes POI strategy, research, advisory, plus elevates practices and CPG and Retailer relationships.

Prior to joining POI, Pam was the Director of IT Governance for Del Monte Foods. In her role she led IT Governance and the PMO. In her previous role as the Director of Sales Operations, she led: Sales Strategy & Operations, Sales Systems and BI Analytics. She drove collaborative solutions and change across the organization based on corporate strategy and with the support of cross functional partnerships.

Prior to joining Del Monte, Pam worked for Unilever and quickly progressed through numerous sales positions of increasing responsibility. She then joined Kayser-Roth and became the Western Division Sales Director for all Retail CPG business west of the Mississippi. Pam has 30+ years of Sales & Systems experience and CPG leadership. She demonstrates a passion for creating a competitive advantage through high-performing teams. Pam earned her BA in Business Administration from the University of California at Riverside.



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About the Designer

Madelyn Grau has led POI's marketing, communications, and design department since 2023. With her leadership, the team has transformed POI communication, including our weekly POI Pulse Newsletter, marketing of POI events, webinars, white papers, research reports, and more.

Madelyn has been essential in creating POI's 2026 State of the Industry Report. The report's continued year-over-year improvement in look and feel is transformative. We aim to continue to upscale the report so you can easily utilize POI's research content in your leadership presentations, business cases, and strategic enterprise planning decisions.

If you haven't seen the new POI Pulse Communication, please do. It contains details about upcoming POI events, webinars, research, and more. POI looks forward to supporting your journey.

Feel free to copy the link to enjoy POI's Pulse Newsletter, where you can discover all the amazing resources POI has to offer to support you on your journey:
https://lp.constantcontactpages.com/su/ASWziSS/poipulse



Madelyn Grau

Director of Marketing, Design, and Comms
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About the Research Collaborator

Maya Miller joined POI in 2024 as manager of marketing and communications. With a background in Marketing from Texas Tech University, she brings experience in content development, strategic communications, and market research.

She has been instrumental in the publication of POI's State of the Industry report by managing the State of the Industry surveys, ongoing communications, and researching the industry economic statistics and foodservice trends. She also co-led the editing team throughout the publication process.

If you haven't seen the new POI Pulse Communication, please do. It contains details about upcoming POI events, webinars, research, and more. POI looks forward to supporting your journey.

Feel free to copy the link to enjoy POI's Pulse Newsletter, where you can discover all the amazing resources POI has to offer to support you on your journey:
https://lp.constantcontactpages.com/su/ASWziSS/poipulse



Maya Miller

Manager of Marketing & Communications
mmiller@p-o-i.org

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About the Promotion Optimization Institute

POI brings together manufacturers, retailers, solution providers, analysts, academics, and other industry leaders with the specific objective of collaboratively improving enterprise planning, trade management, RGM, pricing, advanced analytics & optimization, data management, retail execution, digital transformation, omnichannel strategy, eCommerce and digital shelf, marketing and retail media investment strategy and performance, omnichannel measurement, and the distribution of consumer goods.

Members of POI share cross-functional best practices in both structured and informal settings. Additionally, members benefit through our industry alliances, the Certified Collaborative Marketer (CCM) program, share groups, and industry-leading summits around the globe. POI aims to instill a financial and metrics-based discipline not typically found in other trade groups. We encourage and enable breaking down organizational siloes to ensure collaborative, holistic full enterprise planning. The focus is on the consumer/shopper through sales, marketing, and merchandising strategies while leveraging advances in technology. Our POI executive advisory board keeps us apprised of industry needs and helps us provide desired outcomes for members, sponsors, and academia.

For more information, visit www.poinstitute.com or contact:

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Pam Brown, Partner & CCO Promotion Optimization Institute (POI) 707-332-0450 pambrown@p-o-i.org

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Learn More About POI

See how POI serves the CPG industry and tap into
robust resources to maximize your organization’s potential

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POI Offerings to Support Your Organization Today & Through the Future of Work

- **Certified Collaborative Marketer (CCM)™ Program** – Upskill talent in your organization through POI's certification for next-generation CPG and Retail professionals.
- **POI Summits** – Advance commercial capabilities, hear peer-set strategies, learn modern approaches, explore vendor capabilities & services, and optimize the perfect store retail experience. Includes pre & post summit workshops to dig deeper into practical use cases.
- **Transformational Leadership Council (TLC)** – Cost pressures, inflation, board demands, omnichannel shifts, increased consumer expectations, new brand competition, innovation, DTC, aging technology, digital and organizational structures. Discuss how leadership teams prioritize "first things first" business plans and set a strategy for growth. Work through issues/opportunities created by the evolution of the new commercial ecosystem.
- **POI Share Groups** – Gain peer connection & collaboration, insight into best practices & trends, peer benchmarking, workshops, and access to POI resources.
- **POI Manufacturer Advisory** – Supports manufacturer investigation and selection of new Enterprise Planning (EPx), TPMx, and RGM platforms through a 4-Phase/4-Month approach. Through the 4-Phase approach, companies understand the latest CPG trends, strategies, and EPx best practices. CPG leaders gain alignment on what they are trying to solve with EPx capabilities. Business requirements are gathered and aligned. Vendors are determined based on the best-fit to requirements. RFPs are facilitated to determine final vendor selection.
- **Revenue Growth Management (RGM) Training and Enterprise Preparation** – Demystify RGM for your sales organization, prepare C-suite/Board with an understanding of how RGM practices can support profitable growth, and/or arm your RGM leaders on their path to organizational change.



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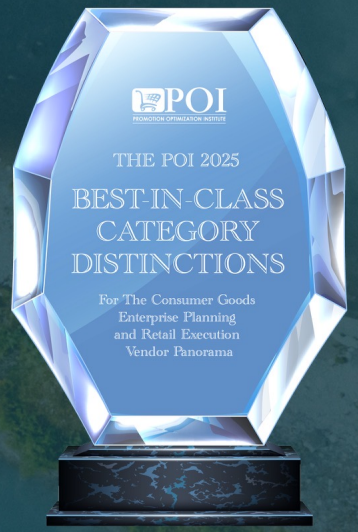





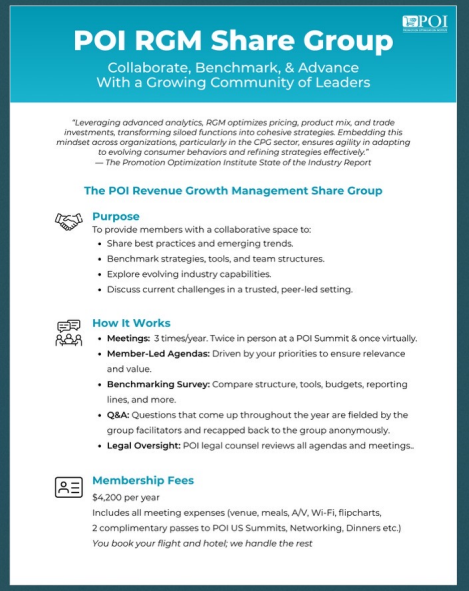

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POI SUMMITS

Connect, Share, Learn, and Inspire













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POI 2026 In-Person / Virtual Hybrid Summit Opportunities



POI 2026 SPRING SUMMIT

Deliver omnichannel growth and efficiency through enterprise digital transformation by enabling cornerstone capabilities: Trade Promotion Management, Advanced Analytics/AI/ML, Revenue Growth Management, Retail Execution, and Marketing.

Chicago, Illinois | April 15-17 In-person and virtual attendance available!



POI 2026 LATAM SUMMIT

Deliver omnichannel growth and efficiency through enterprise digital transformation by enabling cornerstone capabilities: Trade Promotion Management, Advanced Analytics/AI/ML, Revenue Growth Management, Retail Execution, and Marketing.

Mexico City, Mexico | June 3-5 2026 Solutions for LATAM, by LATAM.



POI 2026 EUROPEAN SUMMIT

Deliver omnichannel growth and efficiency through enterprise digital transformation by enabling cornerstone capabilities: Trade Promotion Management, Advanced Analytics/AI/ML, Revenue Growth Management, Retail Execution, and Marketing.

England | 12-14 May



POI 2026 FALL SUMMIT

Deliver omnichannel growth and efficiency through enterprise digital transformation by enabling cornerstone capabilities: Trade Promotion Management, Advanced Analytics/AI/ML, Revenue Growth Management, Retail Execution, and Marketing.

Dallas, Texas | November 11-13 In-person & virtual attendance available!

Review Summit Agendas and Register Your Organization: poinstitute.com/events

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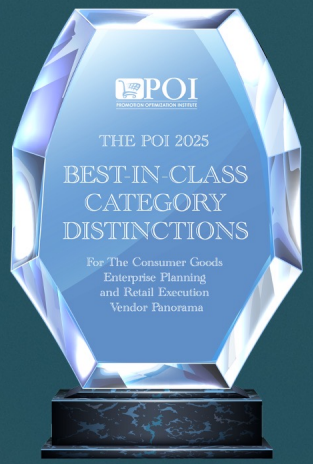
Gain Access to POI's Enterprise Planning and Retail Execution Vendor Panorama Research & Report

- **Exclusive Consumer Goods Industry Enterprise Planning Research** — Renowned for its unparalleled depth in capability coverage, POI provides comprehensive insights with 5–10 pages per vendor, tailored to the breadth of each provider's ecosystem. This research goes far beyond standard quadrant analyses, offering expert perspectives from seasoned CPG leaders with firsthand experience leading complex capability implementations.
- POI's Vendor Panorama includes: Trade Promotion Management (TPM/TPMx), What-if Promotion Scenarios, Post-Event Evaluation (ROI Analysis), Revenue Growth Management (RGM), Retail Execution (RetX), Data Management, Advanced Analytics, Artificial Intelligence/Machine Learning, Modeling Approaches, Integrated Business Planning (IBP), Foodservice and more.
- POI's Vendor Panorama report is widely recognized by CPG manufacturers and solution providers as the definitive resource for evaluating RFI and RFP vendor candidates.
- POI Best-in-Class Distinctions relay vendor differentiators.

Manufacturers rely on POI's Vendor Panorama to gain insights into the current market and vendor capabilities, enabling informed decisions about the vendors that best align with their organization's requirements. https://poinstitute.com/membership/





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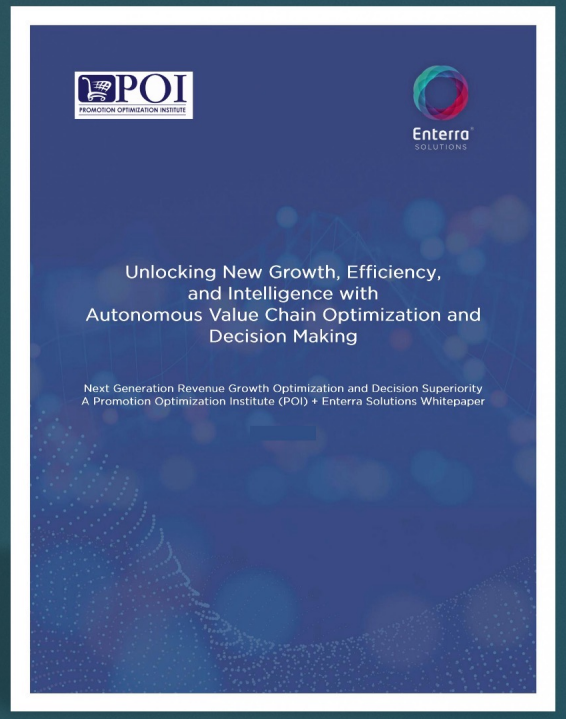
POI Thought Leadership White Papers









What's on your reading list to advance your career and cross-functional partnerships?

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Strengthening Connections, Best Practices, and Learning

POI Manufacturer Connect Share Group for U.S., Canada, and Europe

- Peer Connection
- Insights Into Best Practices & Trends
- Peer Benchmarking
- Opportunities for Collaboration
- Resources
- Regularly serving 500+ manufacturers
- Meets every 6-8 weeks

Don’t do the journey alone!



Pam Brown



Sarah Meyer

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Strengthen Revenue Growth Management Connections & Best Practices

POI RGM Share Group

Collaborate, Benchmark, & Advance
With a Growing Community of Leaders

"Leveraging advanced analytics, RGM optimizes pricing, product mix, and trade investments, transforming siloed functions into cohesive strategies. Embedding this mindset across organizations, particularly in the CPG sector, ensures agility in adapting to evolving consumer behaviors and refining strategies effectively."
— The Promotion Optimization Institute State of the Industry Report

The POI Revenue Growth Management Share Group

Purpose

To provide members with a collaborative space to:

- Share best practices and emerging trends.
- Benchmark strategies, tools, and team structures.
- Explore evolving industry capabilities.
- Discuss current challenges in a trusted, peer-led setting.

How It Works

- **Meetings:** 3 times/year. Twice in person at a POI Summit & once virtually.
- **Member-Led Agendas:** Driven by your priorities to ensure relevance and value.
- **Benchmarking Survey:** Compare structure, tools, budgets, reporting lines, and more.
- **Q&A:** Questions that come up throughout the year are fielded by the group facilitators and recapped back to the group anonymously.
- **Legal Oversight:** POI legal counsel reviews all agendas and meetings..

Membership Fees

$4,200 per year

Includes all meeting expenses (venue, meals, A/V, Wi-Fi, flipcharts,
2 complimentary passes to POI US Summits, Networking, Dinners etc.)

You book your flight and hotel; we handle the rest

Key Topics We Explore

- Revenue Management Skills and Processes
- Advanced Analytics
- Best Practice Sharing
- Channel Strategy
- Pack Strategy
- Product Mix
- Promotion Optimization
- Sourcing and Procurement
- Value Incentive Curves
- Execution and Sell-in Considerations
- Strategic and Tactical Roadmaps
- Cross-functional Collaboration
- Team Structure and Roles

Why Join?

Many join the RGM share group so they aren't alone in leading their RGM journey. This group allows you to gain access to shared expertise, insights, and best practices that can help improve your business strategies, enhance collaboration, break down barriers, and accelerate revenue growth. It also offers opportunities for networking, innovation, and collective problem-solving, ultimately providing enhanced skills and a competitive advantage.

Interested in Joining?

If you'd like to join or know someone who might be a good fit, please scan the QR code below to complete a short interest form, and POI will reach out to you.

Having trouble scanning?Please use the link:
https://bit.ly/POIRGMShareGroup

Questions? Let's Connect!

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POI
PROMOTION OPTIMIZATION INSTITUTE



Vicente Garcia

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POI RGM Trainings & Certification

POI RGM Training Courses:

Demystify RGM for Organizations™

Helps cross-functional teams understand Revenue Growth Management and its key pillars. Builds a shared RGM language so teams understand their role in driving profitable growth and enabling collaboration and change.

Implementing RGM with Retailers™

Execution is what delivers results. This course approaches RGM from a retailer perspective. Participants learn how to shift from transactional selling to strategic, value-based RGM planning with retail partners.

RGM Essentials for Senior Leaders & Executive Teams™

Designed for senior leaders looking to accelerate RGM impact across their organization. Covers common pitfalls and how to remove organizational barriers on the RGM journey.

RGM Basics for Sales Teams™

A hands-on course equipping sales teams with practical RGM skills. Focuses on pricing, promotion, mix optimization, and leading stronger, data-backed conversations with retailers.

POI RGM Foundation Certification™

The RGM Foundation Certification™ is a comprehensive, three-course training program designed to develop practical Revenue Growth Management (RGM) skills within consumer-packaged goods (CPG) organizations. This interactive program equips cross-functional teams with a unified understanding of the five RGM pillars: pricing, promotion, trade, mix, and analytics. Participants will gain the confidence to apply RGM principles in their daily decision-making.

Through hands-on exercises, real-world case studies, and retailer-ready tools, participants will learn how to effectively convert data into actionable insights, enhance their pricing and promotion strategies, and foster better collaboration across functions and with retail partners.

Need to evolve your organization quickly and embed an RGM mind-set? POI can train and certify your teams at your National Sales Meeting.

Visit the POI Website for more information and to register for your training https://poinstitute.com/training/

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Strengthen Cross-Functional Knowledge, Skillsets and Drive Mutually Beneficial Alignments Across Your Organization

CCM Executive Training/Certification

- 100% Online Delivery
- Included with POI Membership
- Executive Program held virtually or at St. Joseph's University, PSU, ASU
- Developing Skills and Strategies around Collaborative Cultures, Analytics, RGM, TPMx, Optimization, Marketing, and Digital Transformation
- One-day virtual kick-off, 6-month self-directed study, monthly virtual connection calls, exercises, and final collaborative project

The POI Executive Certification Program is tailored to equip current and future leaders in CPG and Retail with the skills needed to thrive in the CPG Industry.

https://poinstitute.com/certification-ccm/



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POI Manufacturer Advisory

POI 4-Phase Advisory supports a manufacturer's vendor investigation and formal RFP process, enabling organizations to finalize their TPMx and/or RGM technology partners in four months*.

01

Setting the Stage

State of the Industry

Alignment on What Mfg is Trying to Solve

02

Business Requirements

Insights From Cross-Functional Stakeholder Interviews & Alignment Workshops

03

Vendor Determination

Stack & Align Vendors for RFP Based on Business Requirements

04

RFP Execution

Formal Process

Vendor Demos

Cross-Functional Alignment

* Typical manufacturer timeline without POI Advisory Leadership is 12-18 months.

POI Advisors:



Pam Brown



Sarah Meyer



Vicente Garcia

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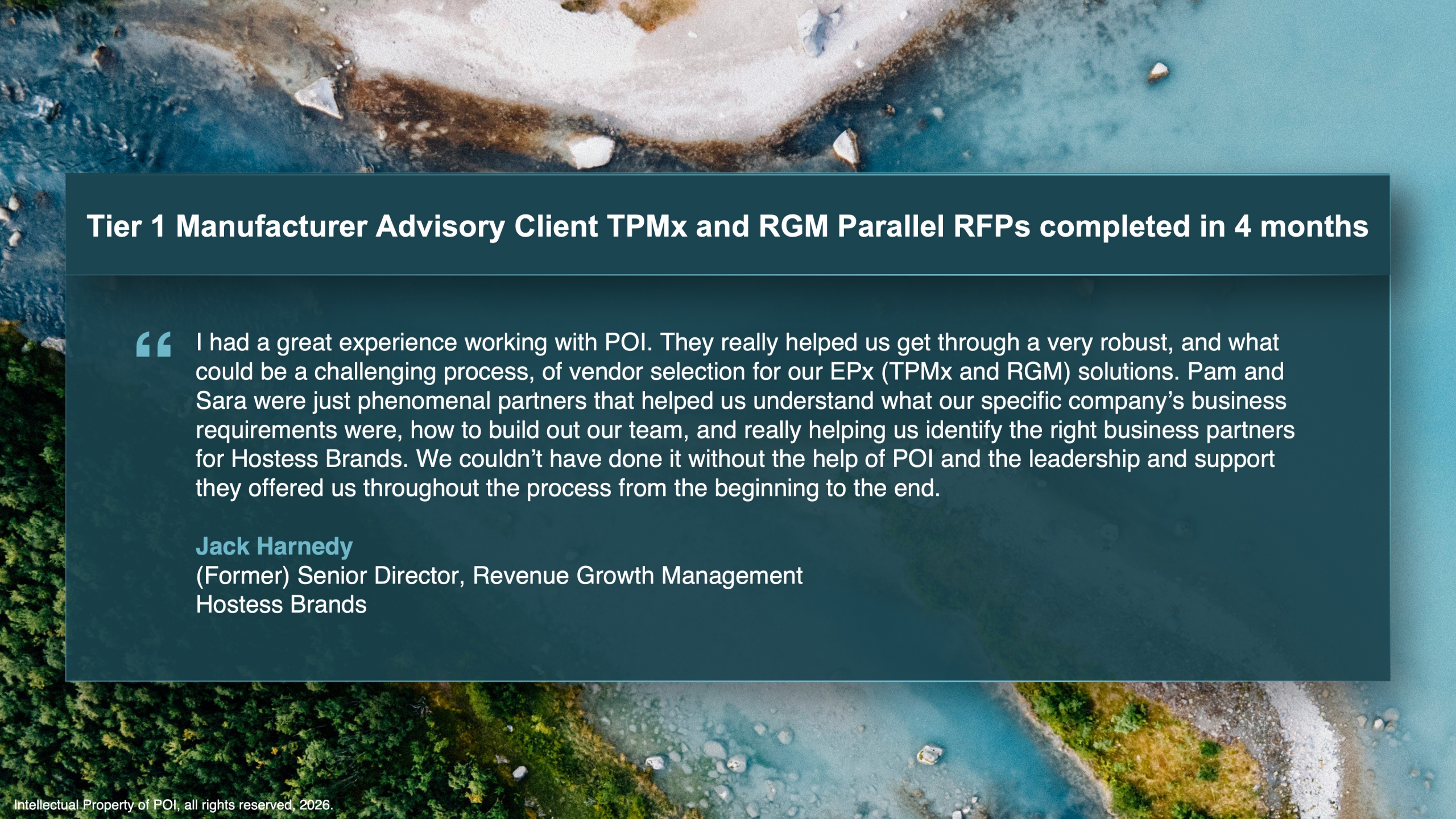

Tier 1 Manufacturer Advisory Client TPMx and RGM Parallel RFPs completed in 4 months

> I had a great experience working with POI. They really helped us get through a very robust, and what could be a challenging process, of vendor selection for our EPx (TPMx and RGM) solutions. Pam and Sara were just phenomenal partners that helped us understand what our specific company's business requirements were, how to build out our team, and really helping us identify the right business partners for Hostess Brands. We couldn't have done it without the help of POI and the leadership and support they offered us throughout the process from the beginning to the end.

Jack Harnedy
(Former) Senior Director, Revenue Growth Management
Hostess Brands

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Tier 3 Manufacturer Advisory Client TPMx RFP completed in 4 months

> As I look back to our recent experience working with the POI team through our TPMx RFP, they were vital in the overall process of managing the RFP, including leading the demo process and organizing our internal task force. A key benefit came in leveraging POI's expertise in "speaking the language" and having an intimate, current knowledge of these systems and the broader marketplace, including the processes and the problems. They were able to maximize the efficiency and effectiveness of our vendor selection process by cutting through the jargon and lingo, focusing on what's important, and getting some truly deep and meaningful insights. Another critical value was the ability for POI to help align our project and leadership teams on critical decisions throughout the process. What could have been a year-long process took our organization less than 4 months from start to finish.

Jim Loeffl
Senior Director, Business Development
Musco Family Olive Co.

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